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ABSTRACT

This curriculum guide is designed to train students in the competencies necessary to meet the needs of the automated office in entry-level information processing positions. The guide is organized into 16 units that are correlated with the essential elements for the business information processing course. Introductory materials include a scope and sequence outline, information on use of the instructional units, and suggested teaching strategies. Each unit, which covers more than one lesson or period of instruction, includes the following components: curriculum outline with unit objective, learning objective, generalization or purpose, content outline, learning experience, and evaluation; resource list; competency checklist; unit overview; learning activities; and competency tests. The 16 units are divided into 5 sections as follows: (1) contemporary office systems (information processing in the automated office, successful employment); (2) related skills for information processing (keyboarding skills, business communication skills, proofreading information, formatting business documents, transcription skills); (3) processing information (word processing concepts, document production); (4) information management (records management, database management, electronic spreadsheet applications, financial management); and (5) information distribution (telecommunications, graphics, desktop publishing). Appendixes include information on lesson plans, essential elements, lists of resource organizations, and information on curriculum modification for special needs students. (YLB)

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CURRICULUM GUIDE

BUSINESS INFORMATION PROCESSING

OCCUPATIONAL CURRICULUM LAB (L) EAST TEXAS STATE UNIVERSITY

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BUSINESS INFORMATION PROCESSING

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INTRODUCTION

This curriculum guide is designed to train students in the competencies necessary to meet the needs of the automated office in business and industry in entry level information processing positions. It is to serve schools as a **basic resource** and provides **traditional** and **basic** skills content along with contemporary office skills.

The **focus** of this curriculum guide is on the instruction of **broad, transferable basic information processing skills**. Students are introduced to a **systems approach** to functional informational management in the office. The concept includes all phases of administrative work and correspondence support for **document production** and **electronic manipulation of data**. General competencies of **problem-solving** and **communication skills** are stressed. Skills involved include knowledge of integrated office systems, oral and written communications, machine transcription as part of a larger project, workflow and work measurement techniques, analytical skills in using the manipulation and output of a spreadsheet and database in the document production cycle, records management concepts as part of database and file management instruction, and understanding the procedures for information flow via electronic computing and communicating within and outside of the office. **Emphasis** is also placed on **human relations, decision-making, financial management**, and **priority-setting abilities. Basic mathematical** and **language usage** skills are constantly reinforced.

Because each student learns differently, and because each program should meet the needs of its local population, this guide was developed with **flexibility**, allowing the instructor to teach **basic skills** in a variety of methods. Although the guide is **scoped** and **sequenced**, many units can be incorporated into **rotation schedules, integrated software systems instruction** and **individualization**. Each instructor is encouraged to **modify**, **add**, or **delete** information as necessary to meet the individual needs of each student and the needs of the local program.

The instructional method used will depend upon **class size**, **student abilities**, and **equipment**. Each unit addresses the **cognitive**, **affective**, and **psychomotor** domains. An **appendix** is included that contains **lesson plan information and samples** to aid the instructor in preparing relevant plans for instruction in the individual classroom according to terminology and procedures adopted by the Texas Education Agency.

The curriculum guide is organized into **sixteen units**. The units are **correlated with the essential elements** for the Business Information Processing course. Although many of the activities suggested in this guide could be completed without the use of outside resources, it is suggested that the Office Education instructor utilize some of the resources listed in each instructional unit in order to assist the students in gaining realistic experience in office occupations.

It is also suggested that the instructor wishing to use this curriculum guide first read the "Use of Instructional Units" and "Suggested Teaching Strategies" before beginning any instruction.

BUSINESS INFORMATION PROCESSING

SCOPE AND SEQUENCE OUTLINE

ONE YEAR PLAN

INSTRUCTIONAL UNIT	CURRICULUM OUTLINE	ALLOCATED TIME/HOURS	ESSENTIAL ELEMENT
			75.87
INFORMATION PROCESSING IN THE AUTOMATED OFFICE	pp. 3-11	5	(c)(4)(A) (B)(C)(D)
SUCCESSFUL EMPLOYMENT	pp. 63-75	10	(a)(1)(2) (4)(5)
KEYBOARDING SKILLS	pp. 137-139	10	(c)(1)(F)
BUSINESS COMMUNICATIONS	pp. 169-188	7	(a)(2)(C) (c)(1)(A)
PROOFREADING	p. 253	3	(c)(1)(A)
FORMATTING BUSINESS DOCUMENTS	pp. 279-293	7	(c)(1)(B)
TRANSCRIPTION SKILLS	pp. 335-337	10	(c)(1)(D)
WORD PROCESSING CONCEPTS	p. 357	10	(c)(1)(E)
DOCUMENT PRODUCTION (Including Integrated Software Applications)	pp. 387-394	48	(c)(1)(E)
RECORDS MANAGEMENT	pp. 421 & 422	5	(c)(2)(A)
DATABASE MANAGEMENT	pp. 449-455	10	(c)(2)(B)
ELECTRONIC SPREADSHEET APPLICATIONS	pp. 487-499	15	(c)(2)(C)
FINANCIAL MANAGEMENT	pp. 541-548	10	(c)(1)(F) (a)(3)(6)
TELECOMMUNICATIONS	pp. 691-697	10	(c)(3)(A)
GRAPHICS	pp. 727 & 728	5	(c)(3)(B)
DESKTOP PUBLISHING	pp. 741-745	10	(c)(3)(B)

USE OF THE INSTRUCTIONAL UNITS

INSTRUCTIONAL UNITS

Each unit in the *Business Information Curriculum Guide* is correlated to the essential elements. Each unit is planned to cover more than one lesson or period of instruction. These units include the following components:

A. **Curriculum Outline:** Provides the unit objective, learning objective, generalization (or purpose), content outline, learning experience and evaluation.

B. **Resource list:** Provides suggested supplementary materials available to use for additional information and activities.

C. **Competency Checklist:** Provides a means of evaluation of mastery or non-mastery of each learning objective and essential element.

D. **Unit Overview:** Provides unit content information in condensed form and may be duplicated for student use during study of the unit. This section is not designed to give comprehensive information on the unit and should be supplemented by other materials and lectures by the instructor.

E. **Activities:** Provide direction to study and also provide application and reinforcement of cognitive materials presented.

F. **Competency Tests:** Provide a method of evaluation for the unit.

CURRICULUM OUTLINE

Each curriculum outline is designed to serve as a tool to **facilitate preparation of lesson plans** for the unit and to serve as a basic unit plan for each instructional unit. Additional information and suggestions for lesson plans are provided in **Appendix A** of the curriculum guide.

Each unit of instruction is based on **performance objectives**. These objectives state the goals of the course, thus providing a sense of direction and accomplishment for the student.

Performance objectives are stated in two forms: **unit objectives**, which state the terminal performance expected of the student upon completion of the unit, and **learning objectives**, which are those performances that will help the student to master the unit objective.

Since the objectives of the unit provide direction for the learning process, it is important for the teacher and students to **discuss the objectives** prior to covering the information in the unit. This discussion will provide a common understanding between teacher and student of the intent of the objectives. Performance terms have been used in all objectives of the units to assist in promoting the effectiveness among all individuals using the materials.

Instructors should feel free to delete or add objectives to tailor the material to the needs of the students and the program. When objectives are added, corresponding information, activities, and evaluation should be designed and constructed.

RESOURCE LISTS

The resource lists in each unit provide **additional instructional materials** pertaining to the unit. These materials include **text-workbooks**, **practice sets**, and **software**. They provide a wealth of additional information for the instructor. The resource lists also provide an excellent source for reteach activites for students that have not gained mastery in the stated objectives for the unit.

COMPETENCY CHECKLIST

The competency checklist is developed to assist the instructor in recording individual student progress toward the accomplishment of the unit competencies and in **recording the mastery of each essential element** and **unit objective**. Space has been provided for additional activities and individualized and reteach activities.

UNIT OVERVIEW

The unit overview is an attempt to condense available information to provide content essential for meeting **cognitive objectives** of the unit. Information may be presented in several ways: (1) The instructor may use the information sheet as a guide for presenting the background knowledge necessary for the students to complete the unit objectives and, ultimately, the learning objective, or (2) students may be allowed to read the unit overview sheets before, or as, information is discussed in class. Students should take notes on any additional information presented.

ACTIVITIES

Learning activities for the students provide direction to study and also provide **application** and **reinforcement** of cognitive materials presented, using the psychomotor and affective domains. An effort has been made to incorporate the following elements of the learning process: **translation**,

interpretation, **application**, **analysis**, **synthesis**, and **evaluation** so that the learning style of each student will be recognized.

The activities may be given to the students for completion in class or may be used as homework assignments. Answer sheets are provided which may be used by the teacher and/or student in checking student progress.

The instructor should preview the activity prior to making student assignments to ensure that information has been covered and all supplies required are available. Class time should be set aside for those activities that require group participation. Those activities that require student participation rather than written answers should be evaluated to the satisfaction of the instructor.

COMPETENCY TESTS

Evaluation is most successful when objectives are clearly stated in advance of a learning experience. The evaluation should be used to measure students' attainment of those specific objectives. Competency tests allow teachers to make a judgment about student progress in relation to a predetermined standard. These **standards** should reflect those established by the business community for **entry level** employees. It is important that students understand the criteria that are used to evaluate their competency in a given subject area.

The evaluation instruments in this curriculum guide may be used in the following ways:

INDIVIDUALIZED INSTRUCTION

After brief directions from the instructor, the student may complete the activities, and is then ready for the competency test. If test results show a weakness in an area, the student should **review** that portion of the unit overview and **retake** the test.

GROUP INSTRUCTION

After participating in classroom discussion and completing the student activities, the student should be able to **demonstrate mastery** of items listed on the **competency checklist** in the curriculum guide. The competency test can be used to measure students' progress toward meeting these objectives.

REMEDIAL AND RETEACH INSTRUCTION

Students who demonstrate a poor understanding of the subject matter may need **remedial help**. Competency tests in basic skills may be administered to **diagnose the problem areas**. For example, students in word processing classes who lack basic English usage skills could take the competency test in this area to locate the deficiency. Once identified, **remedial instruction** could be initiated.

SUGGESTED TEACHING STRATEGIES

The nature of the Business Information Processing course content lends itself to flexibility and the incorporation of varied teaching strategies and methods. Information processing has grown in importance in industry as well as in the classroom. The needs of businesses that were once satisfied by simply keying and editing documents now require the information processing capability of **data formatting, manipulation**, and **analysis**. The content and structure of the information course should be evaluated with respect to the **needs and trends of local business and industry** to determine the **effectiveness** and **timeliness** of this course and to determine methods of instruction. There are four basic areas to be considered:

1. Changing business needs
2. Changes in hardware and software
3. Changing student needs
4. Areas that will impact the information processing jobs in the future.

The wide acceptance of the microcomputer in the business office has led to an **expansion of computer applications** from strictly word processing to applications requiring the use of **spreadsheet and database software packages**. The work of support staff personnel is much more **project oriented**. **Electronic mail** and **electronic filing applications** are increasing rapidly. New employees are expected to be **flexible** enough to adjust to existing systems and procedures and also be willing to learn new applications as they arise. Instructors are expected to be flexible enough to **meet the needs of students** that have computing and keyboarding skills, as well as students without prior computer experience or instruction.

Students should be trained to understand the relationship between the various computer applications learned in the classroom and the requirements of the job. Students must be made aware that they will be required to **adjust** to an **existing system and procedures** and that their **skills must be transferable**. We are no longer in a position to focus on only one type of equipment or software. Office automation instruction requires an **ongoing process of learning** for both the student and the instructor. **Project-oriented realistic applications** such as combining the output from a database or a spreadsheet assignment to complete a series of letters or reports, is one way to accomplish this type of training.

Students who aspire to attain positions higher than entry level must have a firm understanding of **system concepts**. They also need to have **basic machine** and **communication skills**. **Integrating** system concepts with machine operation skills is a way for instructors to introduce students to information processing. This can be done by integrating many of the curriculum guide units and teaching them simultaneously. The success for this type of integrated and simulated instruction depends largely on **equipment**, **space**, and the **abilities and needs of the students**.

Business Communications, Proofreading, Formatting Business Documents, and Transcription Skills are units that can easily be combined. Using a **project-oriented focus** requiring one student's output to be another student's input is one way of **reinforcing** these skills. **Combining the output** from a database or a spreadsheet assignment to complete a series of letters or reports is also a realistic application.

Many concepts are easier to understand when accompanied by a **related machine operation**. When concept lessons are **interwoven** with machine application lessons, students have adequate time to get their machine assignments completed during lab periods. The **blend of the two types of learning experiences** enables every student to reach achievable goals in information processing.

The organization of the curriculum guide allows for implementation of many strategies and methods. The instructor is **encouraged** to be **creative** in their use of the materials and information presented here. Sixteen units are divided into five sections as follows:

SECTION I - CONTEMPORARY OFFICE SYSTEMS
    Unit 1 - Information Processing in the Automated Office
    Unit 2 - Successful Employment
SECTION II - RELATED SKILLS FOR INFORMATION PROCESSING
    Unit 1 - Keyboarding Skills
    Unit 2 - Business Communication Skills
    Unit 3 - Proofreading Information
    Unit 4 - Formatting Business Documents
    Unit 5 - Transcription Skills
SECTION III - PROCESSING INFORMATION
    Unit 1 - Word Processing Concepts
    Unit 2 - Document Production
SECTION IV - INFORMATION MANAGEMENT
    Unit 1 - Records Management
    Unit 2 - Database Management
    Unit 3 - Electronic Spreadsheet Applications
    Unit 4 - Financial Management
SECTION V - INFORMATION DISTRIBUTION
    Unit 1 - Telecommunications
    Unit 2 - Graphics
    Unit 3 - Desktop Publishing

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c) (4)

The student will be provided the opportunity to identify characteristics of contemporary office systems related to information processing and management.

OBJECTIVE:	Demonstrate knowledge of information processing systems in the automated office.	MASTERY	NON MASTERY
1.	Read and discuss current literature related to business information processing.	________	________
2.	Identify procedures used in information processing and management.	________	________
3.	Define terms related to information processing and management	________	________
4.	Identify and demonstrate basic information processing concepts and processes to employ the appropriate steps in document production.	________	________
5.	Identify and use computer-based tools for document production.	________	________
6.	Identify emerging information processing tools and understand their impact on business information processing.	________	________
7.	Describe three categories of software.	________	________
8.	Describe the basic functions of three application software packages.	________	________
9.	Identify and describe three categories of peripheral devices.	________	________
10.	Identify changes in office environment and organization.	________	________

STUDENT NAME____

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)** Identify characteristics of contemporary office systems related to information processing and management.

LEARNING OBJECTIVE: Identify and use terminology related to information processing systems and management and including the information processing cycle.

GENERALIZATION: To work effectively in an automated office, workers must be familiar with and able to use terms related to word processing.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TERMINOLOGY	1. Discuss terminology related to information processing.	1. Correctly define terms.
II. DEFINITION OF INFORMATION PROCESSING	2. Complete crossword puzzles using definitions as clues.	2. Identify procedures used in information processing and management.
III. INFORMATION PROCESSING CYCLE A. Origination B. Processing C. Reproduction D. Storage E. Distribution	3. Define identified terms in student's own words. 4. Match definitions and terms.	
IV. AUTOMATED EQUIPMENT A. Hardware B. Software C. Peripheral equipment		

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(4)** Identify characteristics of contemporary office systems related to information processing and management.

LEARNING OBJECTIVE: Read and discuss current literature related to business information processing.

GENERALIZATION: To work effectively in an automated office, workers must understand the history and organizational structure of the working environment.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. CHANGES IN THE BUSINESS OFFICE	1. Research and discuss the history and changes in the business office.	1. List and discuss three changes in the business office.
II. DEVELOPMENT OF OFFICE EQUIPMENT	2. Summarize periodical articles about office personnel organization, automated equipment, WP environments, and/or emerging career paths for clerical workers.	2. List three career opportunities related to information processing.
III. PERSONNEL ORGANIZATION		
IV. WORD PROCESSING ENVIRONMENTS	3. Develop a time line which traces the evolution of office equipment and/or personnel organization.	
V. NEW CAREER PATHS		

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(b)(1)(C)** Demonstrate the ability to enter and retrieve data on a microcomputer.

LEARNING OBJECTIVE: Demonstrate basic information processing concepts and processes to employ the appropriate steps in document production.

GENERALIZATION: Individual workers must understand the total information processing system in order to work efficiently in an automated office.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. THE DOCUMENT CYCLE	1. Discuss the five steps of the document cycle.	1. Accurately list and briefly discuss the five steps of the document cycle.
II. ORIGINATION A. Author, principal, originator B. Methods of input: 1. Longhand 2. Dictation	2. List and discuss the responsibilities of the originator. 3. Collect data and compose simple documents.	2. Demonstrate the ability to input and print simple documents.
III. PROCESSING A. Input B. Proofreading and editing C. Output	4. After becoming familiar with word processing software, input documents, such as letters, memos, or reports. 5. Print documents which were previously input.	
IV. REPRODUCTION A. Methods B. Criteria for selecting	6. Store and retrieve documents to/from magnetic media. 7. List and briefly discuss at least three types of storage media.	

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
V. STORAGE AND RETRIEVAL	8. Given a situation, select an appropriate storage media and explain why it is best.	
VI. DISTRIBUTION	9. List and discuss at least three distribution methods.	
	10. Given a situation, select an appropriate distribution method and tell why it is best.	
	11. Summarize current periodical article(s) on the subject of reprographics, storage media and/or distribution methods.	

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(4)** Identify characteristics of contemporary office systems related to information processing and management.

LEARNING OBJECTIVE: Identify emerging information processing tools and understand their impact on business information processing.

GENERALIZATION: Information systems operators must demonstrate the ability to use automated equipment with appropriate software and peripherals to compose, generate, and revise letters, memos, and reports.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. COMPUTER HARDWARE	1. Identify and discuss three major categories of computers.	1. Accurately list the three major categories of computers.
II. TYPES OF COMPUTERS A. Mainframe B. Minicomputers C. Microcomputers or personal computers	2. Identify and discuss the categories of software.	2. Describe the relative size and differences among categories of computers.
	3. Summarize current periodical article(s) on software application packages.	3. List and describe at least three categories of software.
III. SOFTWARE INSTRUCTIONS FOR THE COMPUTER A. Machine language B. Operating systems C. Programming languages D. Application packages 1. Word processing 2. Spread sheets 3. Data bases 4. Graphics 5. Communications 6. Integrated packages	4. Research current periodicals for information about new application packages and develop a comparison of their capabilities and cost.	4. List and describe the basic functions of three application software packages.
	5. Review instruction manuals of available application packages, and compare operational functions, such as booting the system, opening or saving a new file, or making revisions.	

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(4)** Identify characteristics of contemporary office systems related to information processing and management.

LEARNING OBJECTIVE: Identify emerging information processing tools and understand their impact on business information processing.

GENERALIZATION: Information processing involves the use of peripheral devices.

CONTENT OUTLINE

I. PERIPHERAL DEVICES

II. PRINTERS
  A. Impact
  B. Non-impact
  C. Plotters
  D. Support equipment
    1. Paper feeders
    2 Collators and folding machines
    3. Shredders

III. REPROGRAPHIC EQUIPMENT
  A. Photocopy
  B. Facsimile
  C. Duplicating equipment

IV. INPUT DEVICES
  A. Optical character recognition
  B. Input from microfilm

V. MICROFILM EQUIPMENT

LEARNING EXPERIENCE

1. Identify and discuss categories of peripheral devices.
2. Compare and list differences in at least two types of printing devices.
3. Given a situation, select appropriate printing methods.
4. List and describe at least three reprographic methods.
5. Summarize current periodical article(s) about reprographic, printing, microfilm and/or input methods.

EVALUATION CRITERIA

1. List and describe at least three categories of peripheral devices.
2. Correctly identify appropriate peripheral devices for a given task, such as printing one-time correspondence, publishing a company newsletter, or preparing permanent records for storage.

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/RESOURCES

TEXT/WORKBOOKS

ACCOUNTING AND DATA PROCESSING CAREERS
South-Western Publishing Co.

BUSINESS CAREERS
South-Western Publishing Co.
text, workbook

CAREER SURVEYS
Career Aids, Inc.

COMPUTER FUNDAMENTALS IN THE INFORMATION AGE
Anaheim Publishing Co.

ELECTRONIC OFFICE PROCEDURES
Gregg/McGraw-Hill

EXCEL MACRO LIBRARY
Que Corporation

INFORMATION PROCESSING CONCEPTS, PRINCIPLES, AND PROCEDURES
South-Western Publishing Co.

OFFICE AUTOMATION
AMACOM

OFFICE PROCEDURES
Gregg/McGraw-Hill

OFFICE PROCEDURES
MPC Publishers

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin Co.

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

TELECOMMUNICATIONS: CONCEPTS, DEVELOPMENT, AND MANAGEMENT
Bobbs-Merrill Educational Publishers

THE ART OF USING COMPUTERS
Boyd and Fraser Publishing Co.

THE ELECTRONIC OFFICE
Prentice-Hall

THE ELECTRONIC OFFICE, A GUIDE FOR MANAGERS
Dow Jones-Irwin

THE EVOLVING ROLE OF THE SECRETARY IN THE INFORMATION AGE
C. A. Pesko Associates, Inc.

PRACTICE SETS

APPLEWORKS--INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
South-Western Publishing Co.

APPLICATIONS USING THE PERSONAL COMPUTER
South-Western Publishing Co.

CAREERS IN OFFICE SERVICES
Career Aids, Inc.
four sound filmstrips, educator's guide

COMPUTER EXPLORATION FOR BUSINESS
Gregg Division/McGraw-Hill Book Co.

DALLAS OIL, INC. - AN ADMINISTRATIVE SECRETARY SIMULATION
Gregg Division/McGraw-Hill Book Co.

GIFTIQUE: AN INFORMATION MANAGEMENT WORKFLOW
Integrated Business Simulation
South-Western Publishing Co.

MICROCOMPUTER SIMULATIONS IN BUSINESS
South-Western Publishing Co.

THE ELECTRONIC OFFICE
four filmstrips with teacher's guide
and supplemental activities
Glencoe Publishing Co.

PALMETTO INSURANCE CO. - THE WORD PROCESSING CORRESPONDENCE SECRETARY
South-Western Publishing Co.

PROBLEM SOLVERS: PACKAGE DELIVERY SERVICES

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE
Occupational Curriculum Laboratory
slide presentation

REPORTS, MINUTES AND SCHEDULES
South-Western Publishing Co.

STATION KBOE-TV, A TYPEWRITING PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

TYPING PRACTICE FOR THE TECHNICAL SECRETARY
Gregg Division/McGraw-Hill Book Co.

WORD PROCESSING APPLICATIONS IN PRACTICE
South-Western Publishing Co.

WORD PROCESSING CONCEPTS AND APPLICATIONS
Gregg Division/McGraw-Hill Book Co.

WORD PROCESSING PRACTICE AND APPLICATIONS: CONSULTAMATION, INC.
Gregg Division/McGraw-Hill Book Co.

SOFTWARE

1001 THINGS TO DO WITH YOUR TRS-80
Microcomputer: TRS-80
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

A + DISK
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

ADVANCED VISICALC
Microcomputer: Apple IIe
Software Memory Requirements: 128k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

THE APPLE EDUCATIONAL CLASSICS
Microcomputer: Apple II
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer Optional

APPLEWORKS
Microcomputer: Apple IIe
Software Memory Requirements: 48k, 64k, 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Eighty Column Card, Printer (super serial card)
Apple Computer

APPLEWORKS BUDDIES
Career Aids, Inc.

APPLEWRITER/APPLEWRITER II
Microcomputer: Apple IIc, Apple IIe
Software Memory Requirements: 48k, 64k, 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer, 40 or 80 column display and disk

APPLICATIONS FOR DISPLAYWRITE 2
Microcomputer: IBM
Software Memory Requirements: 256k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

APPLICATIONS MANUAL FOR APPLEWORKS
Microcomputer: Apple
Software Memory Requirements:
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

AUTOWORKS
The Software Touch

BPI
Microcomputer: IBM PC
Software Memory Requirements: 256k
Number of Drives Required: 2
Special Peripheral Equipment Needed: None

BANK STREET WRITER/SPELLER
Microcomputer: Apple IIe, IBM
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

BESMART
Microcomputer: Lanier
Software Memory Requirements:
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

THE BOSS: BUSINESS AND OFFICE MICROCOMPUTER JOB SIMULATOR SERIES
Career Aids, Inc.
Bookkeeper: Apple II, IIe; TRS-80 Model III
File Clerk: TRS-80 Model III

Receptionist: Apple II, IIe; TRS-80 Model III
General Secretary: Apple II, IIe; TRS-80 Model III
Reservation Clerk: Apple II, IIe; TRS-80 Model III
Programmer: Apple II, IIe; TRS-80 Model III
Data Preparation/Entry Clerk: Apple II with keypad, Apple IIe with keypad; TRS-80 Model III

CALC RESULT ADVANCED
Microcomputer: Vic 64
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

CAREER EXPLORATION
South-Western Publishing Co.
disk and student manual, documents and supplies for Apple II, IIc; TRS-80 Model III

MANAGING FOR SUCCESS: CAREER PLANNING
Career Aids, Inc.
Apple II, IIe or IIc; IBM PC

COMPUTERIZED BILLING CLERK
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

COMPUTERIZED INVENTORY PROCEDURES
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer and 80 column card is required

COMPUTERIZED PAYROLL PROCEDURES
Microcomputer: A/RS/IBM
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer and 80 column card required

COMPUTER LITERACY
Microcomputer: Apple
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

CREATIVE WRITER/FILER/CALC
Microcomputer: Commodore
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

DATA ENTRY ACTIVITIES FOR THE MICROCOMPUTER
Microcomputer: TRS-80, IBM, Apple IIe
Software Memory Requirements: 32k, 48k, 64k, 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Dos 1.1, Printer Optional

DATA PROCESSING FOR BUSINESS
Microcomputer: Apple IIe
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

DESKMATE
Microcomputer: Tandy 1000
Software Memory Requirements: 48k, 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: None

EASYWRITER I or II
Microcomputer: IBM (PC/XT)
Software Memory Requirements: 64k, 128k, 256k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: 80 Column Printer

THE EYES HAVE HAD IT -- BUSINESS SOFTWARE
November, 1984

FRAMEWORK
Ashton-Tate

FRAMEWORK II
Ashton-Tate

GETTING STARTED WITH TRS-80
Microcomputer: TRS-80
Software Memory Requirements: 64k
Number of Drives Required: None
Special Peripheral Equipment Needed: Printer Optional

GRAPHWORKS
Pacific Bay International

THE HANDLERS
Microcomputer: Apple II
Software Memory Requirements: 48k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

HOMEWORD
Microcomputer: Apple IIe
Software Memory Requirements: 64k

Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

IBM ASSISTANT PROGRAM
Microcomputer: IBM
Software Memory Requirements: 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

IBM EASYWRITER
Microcomputer: IBM
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

IBM REPORTING ASSISTANT
Microcomputer: IBM
Software Memory Requirements: 128k
Number of Drives Required: 2
Special Peripheral Equipment Needed: None

IBM WRITING ASSISTANT
Microcomputer: IBM
Software Memory Requirements: 128k, 256K
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer, 80 Column Card

INFOMERGE
Pinpoint Publishing

INTRODUCTION TO MICROCOMPUTER APPLICATIONS
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

INVENTORY MASTER
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

JAZZ
Lotus Development Corp.

THE JEANS FACTORY
Microcomputer: Apple IIe
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

KEYPLAYER
Pinpoint Publishing

KEYWORKS
Alpha Software Corp.

THE LETTER EDITOR
Microcomputer: TRS-80
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

LOTUS 1-2-3
Lotus Development Corp.

MACLIGHTENING
Target Software

MACROWORKS
Beagle Brothers

MACWRITE
Apple Computer

MEGAWORKS
Megahaus

MICROCOMPUTER ACTIVITIES FOR OFFICE PROCEDURES
Microcomputer: TRS-80, Apple IIe, IBM PC
Software Memory Requirements: 48k, 256k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer Optional

MICRO-EDITOR
Microcomputer: TRS-80
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

MICROSOFT WORD
MicroPro International Corp.

MICROZINE
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

MULTIMATE
MicroSoft

THE NEWSROOM
Microcomputer: Apple IIe
Software Memory Requirements: 48k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Dot-Matrix printer

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NScrips
Microcomputer: TRS-80
Software Memory Requirements: 64k
Number of Drives Required:
Special Peripheral Equipment Needed: Letter Quality Printer

NUMERIC DATA ENTRY PRACTICE
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

OPEN ACCESS
Software Products International, Inc.

PALMETTO INSURANCE COMPANY
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer Optional

PFS: ACCESS
Software Publishing Corp.

PFS: FILE & GRAPH
Software Publishing Corp.

PFS FIRST CHOICE - QUICK KEY
Software Publishing Corp.

PFS: GRAPH & WRITE
Software Publishing Corp.

PFS: PLAN & GRAPHS
Software Publishing Corp.

PFS SERIES
Software Publishing Corp.

PFS WRITE/PFS FILE
Microcomputer: IBM, Tandy 1000
Software Memory Requirements: 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer Optional
Software Publishing Corp.

PINPOINT
Pinpoint Publishing

PRACTICALC II
Microcomputer: Apple II
Software Memory Requirements: 48k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

PRINT SHOP
Microcomputer: Apple IIe
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Dot-Matrix Printer

PROFILES III PLUS
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

SAMNA WORD III
Microcomputer: IBM PC
Software Memory Requirements: 256k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

SCRIPSIT
Microcomputer: TRS-80
Software Memory Requirements: 16k, 32k, 64k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer Optional

SENSIBLE GRAMMAR
Sensible Software, Inc.

SENSIBLE SPELLER
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer
Sensible Software, Inc.

SUPERCALC 3a or 4
Computer Associates

SUPERKEY
Broderbund Software

SuperSCRIPSIT
Microcomputer: TRS-80/III, IV
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer

VIDEO GALLERY SALES AND SERVICE
Microcomputer: TRS-80
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

VISICALC
Microcomputer: TRS-80, Apple
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer, 132 Column

WEBSTER'S NEW WORLD SPELLING CHECKER
Simon and Schuster, Inc.

WORDCRAFT/80
Microcomputer: Commodore 2
Software Memory Requirements:
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Commodore
8023P-Printer

WORDPERFECT DICTIONARY & THESARUS
WordPerfect Corporation

WORDPRO 4 PLUS
Microcomputer: Commodore
Software Memory Requirements: 32k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

WORDSTAR
Microcomputer: IBM
Software Memory Requirements: 128k, 256k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: Printer
MicroPro International Corp.

WORDSTAR/MAILMERGE/SPELLSTAR
Microcomputer: IBM
Software Memory Requirements: 64k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer

WORDSTAR PROPACK
Microcomputer: IBM
Software Memory Requirements: 127k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

WORK JUGGLER
Microcomputer: Apple, Apple IIe
Software Memory Requirements: 48k, 256k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer, 80 column card

WORDPERFECT
WordPerfect Corporation

WRITING ASSISTANT
IBM Personal Computer Division

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/UNIT OVERVIEW

I. TERMINOLOGY

A. *Administrative Secretary:* someone who performs nontyping duties for several bosses as part of a team or functions as an assistant to executives.

B. *American Standard Code for Information Interchange (ASCII):* widely used coding system to represent data in main computer memory.

C. *Aperture Card:* a type of microform that has an opening in which a strip or frame of microfilm is mounted.

D.. *Application Software:* used with the computer to perform specific tasks. Six basic and widely used software packages are word processing, spreadsheets, data bases, graphic software, communications software, and integrated software.

E. *Basic:* a programming language considered the easiest of all computer languages to learn.

F. *Bit:* represents binary digit and is the smallest unit for storing data in main computer storage.

G. *Byte:* a sequence of binary digits directly following one another, that operate as a single unit.

H. *Cathode Ray Tube (CRT):* a name for the computer screen.

I. *Centralized:* where all personnel and equipment are located in the same area and all or most of the word processing or correspondence work is done.

J. *Central Processing Unit (CPU):* the main computer which contains the arithmetic, logic, and control systems. Data is manipulated here according to the software instructions.

K. *Cobol:* a programming language used for business applications.

L. *Communicating Word Processors:* machines that can send messages or documents electronically from one terminal to another.

M. *Communications Software:* software that allows a computer to send and receive information to and from another computer.

N. *Computer Assisted Retrieval (CAR):* the retrieval of documents stored on microform through the use of computer terminals linked to central file systems.

O. *Computer-Based Message Systems (CBMS):* saves messages sent over a telephone wire or cable until the person to whom the message was sent wants to retrieve it.

P. *Computer Input Microfilm (CIM):* microfilm that is used as input to the computer.

Q. *Computer Output Microfilm (COM):* microfilm that is used in place of paper as the computer output.

R. *Correspondence Secretary:* someone who performs typing duties and is trained to use word/information processing equipment.

S. *Courier Services:* people who provide fast and/or overnight delivery of letters and small packages.

T. *CP/M:* A type of operating system software.

U. *Data Base:* a structured approach to index, store, search, and access large amounts of data.

V. *Decentralized:* personnel and equipment that is located in all areas of a business in minicenters or satellites, where operators work more closely with the originator.

W. *Dedicated Word Processors:* can only do word processing.

X. *Disk Drive:* a piece of equipment that contains the read/write head. The disk drive rotates the inserted disk so that information can be read or written onto it.

Y. *Distributed Logic:* disperses logic to all other terminals and peripherals instead of concentrating it all in one mainframe computer.

Z. *Distribution:* moving words and data from one location to another. Also called communications.

AA. *Facsimile:* a type of copier that electronically sends an original document from one location to a remote location, where it is reproduced as a copy of the original document.

BB. *File Integrity:* ability to store information in a way that it can be found.

CC. *Floppy Disk:* a type of magnetic media that stores information.

DD. *Fortran:* a programming language used primarily for scientific and mathematical purposes.

EE. *Graphic Software Package:* programming to create, store, and transmit information in graphic form, such as bar graphs or pie charts.

FF. *Hard Disk:* a rigid magnetic storage medium with a capacity to store large amounts of data.

GG. *Hardware:* the physical devices, mechanisms, parts, or assemblies that make up a computer.

HH. *Hybrid Environment:* a system in which part of the work is centralized and other work is decentralized.

II. *Information:* a collection of characters, symbols, and numbers that express an idea.

JJ. *Impact Printer:* a printer that produces characters by striking the desired characters onto paper and using an intervening inked or carbon ribbon to transfer the image.

KK. *Input:* what the system works with--the source of information or getting information into an information processing system, primarily by keyboarding.

LL. *Integrated Software Package:* software that combines two or more types of applications software in one program.

MM. *Local Area Networks (LAN):* a network of equipment usually confined within an office building or within groups of buildings.

NN. *Machine Language*: the language understood by computers, written in combinations of ones and zeros; the language into which programs are translated.

OO. *Magnetic Media:* media that record dictation or keystrokes by means of electric impulses and magnetism.

PP. *Magnetic Tape:* tape coated with magnetic material on which information may be recorded and stored.

QQ. *Mailgram:* a service offered by Western Union that combines the telephone and the U.S. Postal Service.

RR. *Mainframe Computer:* traditionally, a computer having a 32-bit processor and designed for many users.

SS. *Microcomputer, Personal or Desktop Computer:* traditionally, a computer having an 8-bit processor and designed for one user.

TT. *Microfiche:* a sheet of film that may contain 100 to 200 miniature images in a grid pattern.

UU. *Microfilm:* a continuous roll of film containing reduced images of graphic or textual material; used for records storage and filing.

VV. *Microfilm Jacket:* a folder consisting of clear material sealed together on two sides; within are channels into which microfilm can be slipped.

WW. *Minicomputer:* traditionally, a computer having a 16-bit processor, designed for two to ten users.

XX. *MS/DOS:* a type of operating system software.

YY. *Non-Impact Printer:* a printer that shapes characters usually through the use of light or a spray of ink.

ZZ. *Operating System Software:* manages the resources of the computer system.

AAA. *Optical Character Recognition (OCR):* a device or scanner that reads printed or typed characters or graphic material, then converts them into signals for input into a data or word processor.

BBB. *Optical Disk:* a recordlike device on which information is stored by the use of light, in the form of laser beams and is used to write and read data.

CCC. *Originator:* the person who changes raw facts and data into useful information.

DDD. *Output:* what the system produces--the final product or end result; the final printing of information after it has been keyboarded, stored, and edited; hard copy (paper).

EEE. *Peripheral:* units that work in conjunction with, but are not a part of a computer, such as printers, phototypesetters, and scanners.

FFF. *Programming Language:* language in which software is written; a set of rules that provide a way of instructing the computer to perform operations to solve a problem.

GGG. *Procedures Manual:* a book containing descriptions and explanations of office jobs, tasks, or systems prepared by a company for its employees.

HHH. *Purge:* to remove obsolete files from the system.

III. *Roll Film:* a roll of microfilm that may be stored on an open reel or housed in a cartridge or cassette.

JJJ. *RPG:* a programming language used for report writing.

KKK. *Shared Logic:* terminals that share computing power of a mainframe and use common data bases.

LLL. *Software:* a program that instructs the operations of word and data processing equipment; all nonhardware elements of a computer system, such as computer programs, procedures for training and operating, support documentation, design and test documentation.

MMM. *Stand-Alone Units:* self-contained word processing systems, not linked to any other equipment or to a mainframe computer.

NNN. *Spreadsheets:* electronic programs based on an accountant's pad or ledger sheet, in which the screen contains rows and columns to form cells; the user programs the meaning and value of each cell, and the program automatically recalculates any affected values when a cell is changed.

OOO. *Teleconference:* a meeting of geographically separated participants connected via a telecommunications system using two-way voice, text, or video communication.

PPP. *Telegraph:* a system that transmits messages by electric impulses sent by wire or radio.

QQQ. *Telex:* an automatic switching service provided worldwide by various common carriers by which information is transmitted over telecommunications lines between teletypewriters.

RRR. *Text Processing:* an automated way of manipulating information from point of origin to finished document.

SSS. *Text Processing Cycle:* involves five steps input or origination; processing; output, printing, or reproduction; file, storage, and retrieval; and distribution or communication.

TTT. *TWX:* a teletypewriter service provided by Western Union. Generally used to transmit brief messages.

UUU. *Time-Shared Systems:* organizations that sell computer time to other organizations.

VVV. *Ultrastrip:* a type of microfilm that may contain 2000 images of 8 1/2" by 11" typewritten pages.

WWW. *Unix:* a type of operating system software.

XXX. *Visual Display Terminal (VDT):* a component of a computer workstation consisting of a keyboard and video screen.

YYY. *Voice Mail:* a technology by which telephone calls can be recorded, stored electronically, and delivered at designated times.

II. DEFINITION OF INFORMATION PROCESSING:

A. The *office* is the place that manages information.

B. *Information* is a collection of characters, symbols, and numbers that express an idea.

1. Information is the orderly arrangement of facts.
2. Information should be accurate, timely, concise, and complete.
3. Information is used as a basis for making decisions.
4. The success of most businesses depends on the efficient, timely management of information.
5. Information is increasing at a high rate. It is estimated that information doubles every six years.

C. *Information processing* is an automated way of manipulating information from point of origin to finished document.

1. New technology facilitates faster, better, yet cheaper information processing.
2. People, procedures, and equipment are the three major elements involved in information processing.
3. The information processing cycle has five steps:
   a. Input or origination
   b. Processing
   c. Output, printing, or reproduction
   d. File, storage, and retrieval
   e. Distribution or communication

D. *Information processing* can be done on a variety of automated equipment:

1. Electronic typewriters
2. Dedicated word processors
3. Microcomputers, personal or desktop computers
4. Mini computers
5. Mainframe computers

E. *Systems Concepts*

III. CHANGES IN THE BUSINESS OFFICE:

A. The *structure* of the office was primarily one boss to one secretary.

B. *Computers* were developed during the 1940-50s.

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C. *Dedicated word processors* provided information manipulation by means of sophisticated programs internally housed in the computer.

D. The invention of *microcomputers* in the 1970's greatly increased computer power in the office and could utilize software for both word and data processing.

E. *Stand alone PC units*, with integrated software packages, became very popular in the 1980's.

F. *PC networks* make it possible for several users to work from a common data base, exchange information, and share peripheral equipment.

G. *Information processing* may be done in either a centralized or decentralized system.

H. New *career paths* emerged as the organization of the office changed and automated equipment was introduced.

I. *Work procedures* and *methods* have changed.

   1. Procedures manuals are used to standardize work.

   2. Productivity is measured for individuals and departments.

   3. A good system of document coding is necessary when many people work on the same documents.

   4. In-house orientation, training, and retraining are often provided for personnel.

J. *New career opportunities* are available.

   1. Upward mobility into management is now possible.

   2. Specialization of tasks has created new job titles.

   3. In addition to correspondence and administrative positions, there are other support positions:

      a. Proofreaders check documents for grammar, punctuation, spelling, and content errors.
      b. Reprographic operators makes copies.
      c. Trainers for in-house training programs.
      d. System analyst selects equipment and suggests procedures.
      e. Records manager is responsible for the organization, storage, and retrieval of information.

   4. Career opportunities in related fields include:

      a. Vendor's sales/training representatives
      b. Service and repair technicians
      c. Computer sales personnel
      d. Authors for technical manuals, textbooks, or periodical articles
      e. Educational instructors
      f. Hardware and software designers and engineers
      g. Research and development scientists

   5. New attitudes and skills are needed for the new careers:

  - a. Willingness to learn and change
  - b. Flexibility
  - c. Team spirit
  - d. Good human relation skills
  - e. Excellent keyboarding and language skills

IV. INFORMATION PROCESSING CYCLE:

A. *Input* or origination is the process of converting raw facts and data to usable information.

1. Relaying this information may be done by a variety of methods:
   - a. *Longhand* is the most popular method; however, it is also the slowest.
   - b. *Dictation* to a stenographer is a traditional method of input.
   - c. *Electronic shorthand* machines reach speeds of 250-300 wpm.
   - d. *Computer-assisted* transcription converts shorthand machine dictation to electronic impulses which are read by the computer.
   - e. The use of *dictating machines* is the fastest method of input and transcription.
   - f. Other methods of input include:
     - (1) Dictation to a typist
     - (2) Composing at the keyboard
     - (3) Voice processing, which converts human voice to electronic data, is still in the developmental stages.

2. The *originator* or *author* should carefully consider the need to generate documents.
   - a. The cost of producing business letters is approximately $8 - $10.
   - b. Is the document really necessary?
   - c. What is the best method of communicating the idea?

B. *Processing* involves converting the information from dictated or handwritten form to a finished document.

1. The *operator* reviews the original copy and selects appropriate style, format, and stationery.

2. The *document* is entered into a computer, usually by means of the keyboard; however, other input methods are available:
   - a. Computer input from microfilm (CIM)
   - b. Optical character recognition (OCR)
   - c. Voice-to-terminal input

3. The *information* is proofread and errors corrected.

4. A *finished* copy is printed and submitted to the originator for review and signature.

5. *Output* involves printing the document and making copies as needed.
   - a. Printing may be done on:
     - (1) Letter-quality or draft-copy equipment
     - (2) Impact or non-impact equipment
     - (3) Sheet feeder or tractor feeders
   - b. Copies may be made by:
     - (1) Printing multiple copies

        (2) Carbon or NCR paper
        (3) Photocopy machine
        (4) Printing machines, such as mimeograph, spirit duplicator, offset, or phototypeset
        (5) Facsimile machines to send copies to another location

C. Once *documents* are printed, they are often reproduced in small or large quantities.

1. Care should be taken to control the number of copies and the use of the equipment.

2. The *criteria* for selecting reprographics methods is based on:

    a. Quantity needed
    b. Quality needed
    c. Cost
    d. Time

3. *Reprographic* methods include:

    a. Multiple printing
    b. Carbon copies, NCR or carbon packs
    c. Duplicating machines, such as spirit, mimeograph, or offset printing
    d. Photocopy

D. *Efficient* storage of documents is important to facilitate information retrieval.

1. The traditional method of storing information on paper in filing cabinets is becoming too bulky, slow, and inefficient.

2. Storage on *microfilm* saves up to 95% of space.

    a. A variety of types of microfilm is available:

        (1) Roll film
        (2) Microfiche
        (3) Aperture card
        (4) Microfilm jacket
        (5) Ultrastrip

    b. Retrieval of microforms is done with a reader and hard copies may be printed.
    c. An efficient indexing system is necessary when storing information on microforms or any system.
    d. Computer assisted retrieval (CAR) is becoming increasingly popular to control documents in large companies or agencies.
    e. Computer output (COM) and input (CIM) may be done directly to/from the computer to the microforms.

3. *Electronic filing systems* store information on magnetic media, such as floppy disks, hard disks, or magnetic tape.

    a. A standardized system of naming and filing documents is necessary.
    b. A computerized indexing and search system is often used in large companies.

4. *Optical disks* use laser beams to write and read data to/from a specially treated, rigid disk.

    a. One 12-inch disk has the storage capacity of approximately one gigabyte, or a billion bytes, or about 1,500 floppy disks.
    b. There are three types of optical disks:

        (1) Read only
        (2) Write once: cannot erase
        (3) Erasable: write, erase, and rewrite

5. A *data base* is a structured approach to index, store, search, and access large amounts of data.
    a. Within a company, indexed information shared among departments is known as a data base.
    b. Subscription data bases are available for a fee: several such services include:
        (1) DATA RESOURCES INC.: statistical information for demographic, industrial, scientific, and economic data
        (2) DIALOG: 200 data bases ranging from art history to zoology
        (3) DOW JONES NEWS SERVICE: business and financial news and statistics
        (4) LEXIS and WESTLAW: legal information
        (5) MEDLINE: medical information
        (6) NEXIS: complete information of New York Times
        (7) COMPU SERVE: stock market data
        (8) THE SOURCE: UPI newswire investment marketing information
        (9) KNOWLEDGE INDEX: magazine index of over 400 periodicals
        (10) BIBLIOGRAPHIC RETRIEVAL SERVICE: complete list of Books in Print

6. Whatever storage media is used, an efficient records retention program must be established to ensure file integrity and periodically purge unnecessary records.

E. *Distribution or communication* of the information is the final step in the document cycle.

1. The *U.S. Postal Service* is by far the most common method of distribution.
    a. They handle over 500 million pieces each day.
    b. Costs have risen sharply, but still remain the most economical.
    c. They can deliver mail virtually any place in the world.
    d. They have introduced several new delivery systems:
        (1) EXPRESS MAIL: guaranteed over-night delivery
        (2) INTELPOST: computer-assisted transmission by means of satellites

2. *Courier services* provide fast and/or overnight delivery of letters and small packages.
    a. Costs range from $10 - $15 for one half pound.
    b. About 2 million items are sent daily.
    c. A variety of courier services are available:
        (1) AIRBORNE
        (2) DHL WORLDWIDE EXPRESS
        (3) EMERY WORLDWIDE
        (4) FEDERAL EXPRESS
        (5) GREYHOUND PACKAGE EXPRESS
        (6) PONY EXPRESS COURIER CORP.
        (7) PUROLATOR COURIER
        (8) TRAILWAYS PACKAGE EXPRESS
        (9) UNITED PARCEL SERVICE

3. *Electronic delivery systems* are becoming more popular, are fast and efficient, and include both old and new technologies.
    a. Telegraph was invented by Samuel Morse in 1844 and is still used today.

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- a. Telegraph was invented by Samuel Morse in 1844 and is still used today.
- b. Telex, TWX, and Mailgram are Western Union systems which use telecommunication lines to transmit information within the U.S. and to foreign countries.
- c. Facsimile equipment transmits data of any type, including signatures, pictures, etc.
  - (1) Over 600,000 terminals exist in the U.S.
  - (2) Cost for equipment ranges from $2 to $10,000
  - (3) Transmission speed ranges from ten seconds to two minutes.
- d. Using communicating word processors, documents can be sent electronically from one terminal to another.
- e. Computer-based message systems (CBMS) are software packages which facilitate communication among compatible terminals.
- f. Voice mail systems are similar to CBMS except the input method is the human voice.
- g. For a subscription fee, information can be sent via public computer networks:
  - (1) GTE Telenet's Telemail
  - (2) Western Union's Easy Link
  - (3) MCI Mail
  - (4) US Sprint's Telenet
- h. Local area networks (LAN) permit communication over a short distance, within a building for example.
- i. Other network configurations include star, ring, star-shaped ring, and bus networks.

4. Methods of *transmitting electronic data* include:
   - a. Telecommunication cables
   - b. Fiber optics
   - c. Microwave radio waves
   - d. Satellite communication

5. *Audio communications* include traditional person-to-person telephone calls and teleconferences for three or more participants.

V. INFORMATION PROCESSING MAY BE DONE ON A VARIETY OF HARDWARE.

A. *Mainframes* are the largest of computers.

1. Shared logic and distributed logic are two types of systems.

2. Terminals may share data and peripheral equipment.

3. Time-shared systems permit a user to purchase computer time from a large mainframe computer.

4. Mainframe systems can support many operators.

B. *Minicomputers* are medium-sized systems and can support five to ten terminals.

C. *Microcomputers*, or personal computers (PC), are very versatile as stand-alone units.

1. The use of PCs has grown tremendously in the past ten years.

        a. From 1977 to 1987, PC units increased from 200,000 to over 80 million terminals.
        b. Marketing research predicts that by 1995, 75% of business workers will be using PCs.

    2. A microcomputer work station generally includes (but is not limited to) five components:

        a. The input device is usually a keyboard.
        b. Central processing unit (CPU) manipulates the data according to software instructions.
        c. Storage is usually a disk drive(s) and floppy disk(s).
        d. The screen is also known as a cathode ray tube (CRT) or visual display terminal (VDT).
        e. The output device is usually a printer.

    3. The function of PCs can be changed to process either information or data, depending on the application software.

VI. SOFTWARE PROVIDES THE INSTRUCTIONS THAT MAKE THE COMPUTER DO VARIOUS TYPES OF TASKS.

A. Computers only understand *machine language*, which is a combination of zeros and ones.

    1. The American Standard Code for Information Interchange (ASCII) is the code for all alphanumeric, punctuation, and function characters.

    2. Each digit of the eight-digit code is known as a bit, and the eight bits constitute a byte which represents a letter, number, or punctuation mark.

B. Regardless of the size, all computers use operating system *software* to manage the resources of the system.

    1. The most common systems are MS/DOS, CP/M and UNIX

    2. Currently there is no standard operating system; therefore, computers with different operating systems are not compatible.

    3. Operating system commands facilitate basic functions, such as formatting and copying disks.

C. Instructions to the computer must be written in a *programming language*:

    1. BASIC is the easiest of all computer languages.

    2. COBOL is mainly used for business applications.

    3. FORTRAN is primarily for scientific and mathematical use.

    4. RPG is used for report writing.

    5. Other languages include LOGO, C, and ASSEMBLER.

VII. APPLICATION SOFTWARE IS USED TO PERFORM SPECIFIC TASKS.

A. *Word processing* manipulates words or information to create letters, memos, reports.

1. *Word Processing* functions include:
   - a. Input or create a document
   - b. Correct, edit, and revise information
   - c. Check for spelling/typographical errors
   - d. Output the document to a printer, microfilm, or storage media
2. *Popular software* packages include:
   - a. WORDSTAR
   - b. MULTIMATE
   - c. WORD PERFECT
   - d. PF WRITE
   - e. PALANTIR

B. *Spreadsheets* facilitate accounting functions.

1. Information and/or formulas are entered in a series of "cells" and calculations are automatic.
2. Popular software packages include:
   - a. SUPER CALC
   - b. MULTIPLAN

C. *Databases* provide an indexed method to organize large amounts of data.

1. The database is broken down into files, records, and fields.
2. A series of dBASE has been very popular.
3. Graphic software packages can create, store, and transmit information in graphic form, such as bar graphs or pie charts.

D. *Communications software* allows a computer to send and receive information to/from another computer. Applications include electronic mail, bulletin board services, or to receive timely information, such as stock market statistics.

E. *Integrated software* packages are combinations of application packages.

1. The user can enter and/or manipulate data using any of the applications, then access other functions through "windows."
2. Integrated packages include:
   - a. LOTUS 1-2-3
   - b. ENABLE
   - c. FRAMEWORK

VIII. PERIPHERAL DEVICES ARE USED TO SUPPORT COMPUTERS.

A. *Printers* are the most common peripheral device.

1. Impact printers may have:
    a. Typebars
    b. Elements
    c. Print wheels
    d. Thimbles
    e. Dot matrix

2. Non-impact printers include:
    a. Laser
    b. Ink jet
    c. Thermal transfer

3. Plotters are used to print graphic data.

4. Printers may be equipped with tractor or sheet feeders.

5. Printers are usually shared among several terminals.

B. *Other equipment* that is used in conjunction with printers include:

1. Envelope feeders or label printers

2. Bursters separate sheets along perforated lines.

3. Collators sort sheets into like sets.

4. Folding and inserting machines

5. Shredders destroy unwanted copies of confidential information.

6. Binding equipment may include:
    a. Hole punch
    b. Stapler
    c. Spiral comb binding
    d. Hotmelt glue or thermal tape

C. *Reprographic equipment* includes:

1. Photocopy machine

2. Facsimile

3. Duplicating equipment such as spirit master, mimeograph, offset, or phototypeset

D. *Peripheral* equipment that assists input include:

1. Optical character recognition (OCR)

2. Computer input from microfilm (CIM)

3. Electronic shorthand machines

E. *Microfilm* equipment includes:

1. Microfilm camera
2. Microfilm readers
3. Computer assisted retrieval of microfilm

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ACTIVITY ONE

DIRECTIONS: The concepts involved with information processing have a variety of unique terms which may be unfamiliar to the student. After studying the list of terms given to you by your teacher, do the following activities.

Match the terms with their definitions.

1. COMPUTER INPUT
2. FILE INTEGRITY
3. CENTRAL PROCESSING
4. COBOL
5. COMPUTER OUTPUT
6. MICROFILM
7. HARDWARE
8. OUTPUT
9. FLOPPY DISKS
10. INPUT

__________ A. The main computer which controls MICROFILM (CIM) arithmetic, logic, and control systems. Data is manipulated here according to the software instructions.

__________ B. A programming language used for business applications.

__________ C. Microfilm that is used as input UNIT (CPU) to the computer.

__________ D. Microfilm that is used in place of paper as the computer output.

__________ E. The ability to store information MICROFILM (COM) in a way that it can be found.

__________ F. A type of magnetic media that stores information.

__________ G. The physical devices, mechanisms, parts, or assemblies that make up a computer.

__________ H. What the system works with--the source of information or getting information into an information processing system, primarily by keyboarding.

__________ I. A continuous roll of film containing reduced images of graphic or informational material; used for records storage and filing.

__________ J. What the system produces--the final product or end result; the final printing of information after it has been keyboarded, stored, and edited; hard copy (paper).

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ACTIVITY TWO

DIRECTIONS: Based on the situation below, what storage media should be used and why?

SITUATION:

The Home Mortgage Corporation processes about 150 loan applications each month. The file for each applicant contains the original application plus several financial documents. During the processing of the loan, many letters are sent and received asking questions and verifying information. If the loan is approved, all documents concerning the loan are kept for a period of five years, or until the loan is paid in full. If the loan is not approved, the file is kept for six months and then purged from the system.

1. What storage media should be used for approved applications? Why?

2. What storage media should be used for applications that are not approved? Why?

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ACTIVITY THREE

DIRECTIONS: Based on the situation below, answer the questions about communication and distribution methods.

SITUATION:

A computer consulting firm has branch offices in three cities in the Southwest. Consultants from each of the three offices serve a territory of approximately one hundred miles; however, two or more consultants from different branches often work together to serve clients from large companies. The firm uses a large data base to share information about the various types of software and hardware, plus statistics about former clients. When submitting bids for equipment, contracts with original signatures must be transmitted in a timely manner. The company's reputation is built on fast, friendly, and efficient service to clients.

1. What method of communication and/or distribution would the consultants from different branches use to discuss a common client? Why?

2. What method of distribution should be used for routine correspondence to clients? Why?

3. What method of distribution should be used to bid on important contracts? Why?

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ACTIVITY FOUR

DIRECTIONS: After researching at least three current periodicals, list and discuss one change that has occurred in the office environment or organizational structure during the past ten years. Be prepared to discuss your research with the class.

Suggested periodicals:

ADMINISTRATIVE MANAGEMENT
MODERN OFFICE PROCEDURES
THE OFFICE
OFFICE SYSTEMS 88
THE SECRETARY
WORD PROCESSING WORLD

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ACTIVITY FIVE

DIRECTIONS: On the list provided, place a check mark beside the characteristics needed by an effective information processing specialist of the future.

Circle the number of characteristics YOU currently possess

___ 1. A positive attitude toward automated equipment

___ 2. Ability to be flexible and accept change

___ 3. A willingness to learn new concepts

___ 4. The ability to organize work efficiently

___ 5. The ability to visualize projects through all stages of development

___ 6. Persistence, a willingness to complete projects

___ 7. The ability to work under pressure

___ 8. The ability to meet deadlines

___ 9. A cooperative attitude to work with other members of the team

___10. A self-starter

___11. Give attention to details

___12. The ability to produce quality work

___13. The ability to work with technical, automated equipment

___14. The ability to follow directions, both oral and written

___15. Excellent language arts skills

___16. Excellent keyboarding skills

___17. Excellent spelling skills

___18. Excellent punctuation skills

___19. Believe in the benefits of automated equipment

___20. Self-confidence

INFORMATION PROCESSING CONCEPTS

Match the terms with their definitions.

___ 1. CPU

___ 2. MS/DOS

___ 3. Dedicated Word Processor

___ 4. Distribution

___ 5. Floppy disk

___ 6. Hardware

___ 7. Information

___ 8. Microfiche

___ 9. Peripherals

___10. Software

A. Characters, symbols, and numbers that express an idea
B. Physical devices that make up a computer
C. Central processing unit
D. A type of microfilm
E. Equipment that supports computers
F. A type of operating system
G. Set of instructions to tell the computer what to do.
H. A magnetic storage media
I. Moving information from one place to another
J. Equipment that can only do word processing

In your own words, define the following terms:

11. ADMINISTRATIVE SECRETARY

12. CPU

13. DISK DRIVE

14. DISTRIBUTION

15. FILE INTEGRITY

16. FLOPPY DISK

17. HARDWARE

18. INTEGRATED SOFTWARE PACKAGE

19. ORIGINATOR

20. PERIPHERAL

21. Identify characteristics of the automated office related to information processing and information management.

22. Describe each step in the document cycle.

23. Explain the systems concept in the automated office.

24. Identify the peripheral devices used in information processing.

25. Identify and describe four information processing tools.

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ANSWER SHEET/ACTIVITIES

ACTIVITY ONE

A.	3
B.	6
C.	1
D.	5
E.	2
F.	9
G.	7
H.	10
I.	4
J.	8

ACTIVITY TWO - Storage Media

1. Microfilm would be an appropriate media for storing documents such as the approved applications. This would save space in the long-term storage and would aid in efficient retrieval.

2. Applications that were not approved would be kept only a short period of time; therefore, paper copies in a traditional filing system would be appropriate.

ACTIVITY THREE - Distribution and Communication

1. Communicating word processing systems would be appropriate for sharing information concerning a common client. This would enable each branch office to access information from the data base. When three or more consultants from different branches need to discuss a client, a teleconference would be used.

2. The U. S. Postal Service would be used to distribute routine correspondence to clients.

3. An overnight delivery courier service would be used to send bids on important contracts.

ACTIVITY FOUR – Answers will vary.

ACTIVITY FIVE – Answers will vary.

INFORMATION PROCESSING IN THE AUTOMATED OFFICE/ANSWER SHEET/UNIT TEST

1. C
2. F
3. J
4. I
5. H
6. B
7. A
8. D
9. E
10. G
11. ADMINISTRATIVE SECRETARY - Someone who performs nontyping duties for several bosses as part of a team, or functions as an assistant to executives.
12. CPU (CENTRAL PROCESSING UNIT) - The main computer which contains the arithmetic, logic, and control systems. Data is manipulated here according to the software instructions.
13. DISK DRIVE - A piece of equipment that contains the read/write head. The disk drive rotates the inserted disk so that information can be read or written onto it.
14. DISTRIBUTION - Moving words and data from one location to another. Also called communications.
15. FILE INTEGRITY - Ability to store information in a way that it can be found.
16. FLOPPY DISK - A type of magnetic media that stores information.
17. HARDWARE - The physical devices, mechanisms, parts, or assemblies that make up a computer.
18. INTEGRATED SOFTWARE PACKAGE - Software that combines two or more types of applications software in one program.
19. ORIGINATOR - The person who changes raw facts and data into useful information.
20. PERIPHERAL - Units that work in conjunction with, but are not a part of a computer, such as printers, phototypesetters, and scanners.

Test items 21 through 25 are to be evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(2)

The student will be provided the opportunity to demonstrate competency in the use of skills relating to successful employment.

OBJECTIVE:	Demonstrate concepts and skills related to successful employment and/or postsecondary training	MASTERY	NON MASTERY
1.	Identify sources of securing employment.	________	________
2.	Compose a letter of application.	________	________
3.	Compose a letter of resignation.	________	________
4.	Prepare a resume.	________	________
5.	Demonstrate proper interview techniques.	________	________
		________	________
		________	________

STUDENT NAME ____

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(5)

The student will be provided opportunities to identify and demonstrate concepts and skills associated with human relations and personality development.

OBJECTIVE:	Understand the importance of maintaining good health and proper appearance, understand oneself, exercise self-control, accept and use criticism, demonstrate human relationships as they relate to business success, and demonstrate characteristics for successful working relationships.	MASTERY	NON MASTERY
1.	Complete a personality assessment.	______	______
2.	Determine short- and long-term goals	______	______
3.	Identify acceptable work attitudes relating to employer/employee relations.	______	______
4.	Identify human relations skills and explain their importance for success in the business world.	______	______
5.	Identify personality traits of a successful business person.	______	______
6.	Demonstrate effective human relations skills and attitudes by role-playing actual case studies.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(1)

The student will be provided an opportunity to demonstrate leadership concepts and skills.

OBJECTIVE:	Demonstrate competency in the use of leadership skills to prepare for effective citizenship in a democratic society.	MASTERY	NON MASTERY
1.	Demonstrate skills, characteristics, and responsibilities of leaders and effective group members.	________	________
2.	Demonstrate a knowledge of parliamentary procedure principles.	________	________
3.	Plan and conduct leadership activities.	________	________
4.	Prepare for effective citizenship and for participation in our democratic society.	________	________
		________	________
		________	________

STUDENT NAME ____

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(1)

The student will be provided opportunities to identify and demonstrate skills related to business management.

OBJECTIVE:	Identify the roles and functions of business management, including organizational policies and procedures.	MASTERY	NON MASTERY
1.	Identify four purposes of organizational policies.	______	______
2.	Identify sources of information for organizational policies.	______	______
3.	Explain the concept of information management.	______	______
4.	Identify the roles and functions of business management.	______	______
5.	Explain the management process.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(2)

The student will be provided the opportunity to demonstrate competency in the use of skills relating to successful employment.

OBJECTIVE:	Demonstrate competency in effective organization of work, work ethics, and time management.	MASTERY	NON MASTERY
1.	Identify effective skills for work organization.	______	______
2.	Explain the necessity of proper work attitudes.	______	______
3.	Explain the importance of effective time management.	______	______
5.	Prepare a time management analysis.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(4)

The student will be provided an opportunity to identify and demonstrate concepts and skills related to safety and safe working conditions.

OBJECTIVE: Identify safe working practices and apply them to all training situations.	MASTERY	NON MASTERY
1. Identify safety attitudes.	______	______
2. Demonstrate safety techniques for the work station.	______	______
3. Demonstrate safety techniques for the work place.	______	______
4. Explain safety precautions for working after hours.	______	______
	______	______
	______	______

STUDENT NAME ______________________________

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/SECURING EMPLOYMENT

UNIT OBJECTIVE: EE 75.87(a)(2)(A)(B) Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Identify and demonstrate effective methods to secure and terminate employment.

GENERALIZATION: Knowledge of successful employment skills and attitudes will help you secure and perform effectively in the career of your choice.

CONTENT OUTLINE

I. SOURCES OF EMPLOYMENT

II. ORGANIZING A RESUME

III. WRITING A RESUME

IV. LETTER OF APPLICATION

V. JOB INTERVIEW PROCESS

   A. Preparation for interview
   B. Application form and employment tests
   C. Interview tips and techniques
   D. Follow-up

VI. TERMINATING EMPLOYMENT

   A. Leading reasons for employee termination
   B. Job resignation

LEARNING EXPERIENCE

1. Locate sources for finding a job.
2. Prepare a personal inventory form.
3. Prepare a resume.
4. Write a letter of application.
5. Complete an application form.
6. Write a follow-up letter.
7. Practice interview techniques.
8. Write a letter of resignation.
9. View slide/tape presentations.

EVALUATION CRITERIA

Demonstrate skills necessary for seeking and terminating employment by:

1. Identifying sources for securing employment.
2. Identifying contents and format of a resume.
3. Composing a letter of application.
4. Composing a letter of resignation.
5. Demonstrating proper interview techniques.

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/HUMAN RELATIONS

UNIT OBJECTIVE: **EE 75.87(a)(5)** Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Demonstrate competency in concepts and skills associated with human relations and personality development.

GENERALIZATION: Human relations and personality are the most important assets to have in the business world.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
Physical Traits Relating to Human Relations in Business	1. Develop and implement a personal physical fitness program.	1. Demonstrate attainment of one goal set in class.
I. GOOD HEALTH AND GOOD GROOMING	2. Complete a personality assessment.	2. Identify seven human relations skills and explain their importance for success in the business world.
	3. Complete a value clarification activity.	
II. UNDERSTANDING ONESELF AND OTHERS	4. Determine short- and long-term goals.	3. Identify thirteen personality traits of a successful business person and explain the importance of each trait.
	5. Hear a guest speaker on human relations in the work place.	
III. HUMAN RELATIONS SKILLS	6. Read, discuss, and role-play case studies on acceptable work attitudes relating to employer/employee relations.	
IV. PERSONALITY TRAITS		
V. SUCCESSFUL WORKING RELATIONSHIPS		

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/LEADERSHIP

UNIT OBJECTIVE: **EE 75.87(a)(1)** Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Demonstrate competency in the use of leadership concepts and skills to prepare for effective citizenship in a democratic society.

GENERALIZATION: Knowledge of leadership skills are necessary for advancement in any career.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. LEADERSHIP STYLES	1. Complete a self-analysis evaluating leadership skills.	1. Identify leadership styles.
II. LEADERSHIP ABILITIES	2. Complete a questionnaire on leadership styles.	2. Identify leadership abilities.
III. COMMON LEADERSHIP TRAITS	3. Identify five leaders and explain the leadership qualities that make them effective leaders.	3. Identify leadership qualities.
IV. LEADERSHIP QUALITIES	4. Demonstrate effective leadership by working on committees to organize civic and service projects.	4. Identify fundamental parliamentary procedures practices.
V. PARLIAMENTARY PROCEDURE PRINCIPLES	5. Demonstrate parliamentary procedure rules by conducting a business meeting.	5. Identify procedures for conducting leadership activities.
VI. PLANNING AND CONDUCTING LEADERSHIP ACTIVITIES		

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/BUSINESS MANAGEMENT

UNIT OBJECTIVE: **EE 75.87(a)(6)** Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Identify the roles and functions of business management and explain the management process.

GENERALIZATION: Knowledge of the management process is essential for employees seeking advancement within a business.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. STRUCTURES OF MANAGEMENT	1. Interview a business person in a management position.	1. Identify the roles and function of business management.
A. Top management B. Division management C. Middle management D. Technical specializations	2. Draw an organizational chart for that person's business.	2. Explain the management process.
II. FUNCTIONS OF MANAGEMENT		
III. MANAGEMENT PROCESS		

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/POLICIES AND PROCEDURES

UNIT OBJECTIVE: EE 75.87(a) Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Identify and understand the importance of applying organizational policies and procedures.

GENERALIZATION: Knowledge of organizational policies and procedures will make it much easier to adjust in the world of work.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. PURPOSE OF POLICIES	1. Discuss the purpose of organizational policies and procedures.	1. Identify four purposes of organizational policies.
II. TYPES OF POLICIES	2. View a film on organizational structure.	2. Identify three sources of information for organizational policies.
III. PURPOSE OF PROCEDURES	3. Secure a sample policies manual from a business organization.	3. Explain the concept of information management.
IV. SOURCES OF INFORMATION		
V. WORK PROCEDURES AND METHODS IN THE AUTOMATED OFFICE		
VI. INFORMATION MANAGEMENT		

SUCCESSFULL EMPLOYMENT/CURRICULUM OUTLINE/WORK ETHICS AND TIME MANAGEMENT

UNIT OBJECTIVE: EE 75.87(a)(2) Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Demonstrate competency in effective organization of work, work ethics, and time management.

GENERALIZATION: Knowledge of work ethics and time management skills, such as priority setting, rank among the most sought after skills in businesss.

CONTENT OUTLINE

I. ORGANIZATION OF WORK

   A. Advantages
   B. Set priorities
   C. Steps of organizing work
   D. Time-saving tips

II. WORK ETHICS

   A. Punctuality
   B. Attendance
   C. Ethical conduct

III. NECESSARY WORK ATTITUDES

IV. TIME MANAGEMENT

   A. Definition
   B. Time management hints
   C. Common time wasters
   D. Time analysis procedure

LEARNING EXPERIENCE

1. Prepare a time management analysis and follow it for a day.
2. Role-play time-saving tips to use in an office.
3. Discuss the advantages and disadvantages of work organization.
4. Divide into small groups and discuss proper work habits and attitudes.

EVALUATION CRITERIA

1. Identify effective skills for work organization.
2. Explain the necessity of proper work attitudes.
3. Explain the importance of effective time management.
4. Identify techniques for effective time management.

SUCCESSFUL EMPLOYMENT/CURRICULUM OUTLINE/SAFETY

UNIT OBJECTIVE: **EE 75.87(a)(4)** Demonstrate competency in the use of skills relating to successful employment.

LEARNING OBJECTIVE: Identify safe working practices and apply them to all training situations.

GENERALIZATION: Safe working conditions and safety procedures by employees are becoming a major concern in the business world.

CONTENT OUTLINE

I. SAFETY ATTITUDES
   - A. Alert
   - B. Aware
   - C. Preventive

II. WORK STATION SAFETY
   - A. Equipment arrangement
   - B. Supply arrangement
   - C. Office furnishings
   - D. Improper use of equipment
   - E. Good lighting
   - F. Noise level
   - G. Personal grooming

III. WORK PLACE SAFETY
   - A. Chemical storage
   - B. Electrical equipment
   - C. Video monitors
   - D. Slipping, tripping, and falling

IV. WORKING AFTER HOURS
   - A. Building security
   - B. Tips for personal security

LEARNING EXPERIENCE

1. Role-play and present to the class a skit on office safety tips.
2. Prepare a safety poster to display in the classroom.
3. Prepare a list of safety rules to display in the classroom.
4. Hear a guest speaker.

EVALUATION CRITERIA

1. Identify three safety attitudes.
2. Identify five safety tips for the work station.
3. Identify five safety tips for the work place.
4. Explain safety precautions for working after hours.

SUCCESSFUL EMPLOYMENT/RESOURCES

TEXT BOOKS

EXPLORING HUMAN RELATIONS
Fulton Houghton Mifflin

GENERAL OFFICE PROCEDURES
Gregg/McGraw Hill

HOW TO FIND AND APPLY FOR A JOB
South-Western Publishing Co.

HUMAN RELATIONS AT WORK
South-Western Publishing Co.

HUMAN RELATIONS IN BUSINESS
South-Western Publishing Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin

PERSONAL PSYCHOLOGY FOR LIFE AND WORK
Gregg/McGraw-Hill

PERSONALITY DEVELOPMENT FOR WORK
South-Western Publishing Co.

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

THE JOB YOU WANT - HOW TO GET IT
South-Western Publishing Co.

PRACTICE SETS

ENTERING THE WORKING WORLD
Glencoe Publishing Co.

ENTERING THE WORLD OF WORK
Career Aids, Inc.

SUCCEEDING IN THE WORLD OF WORK
Glencoe Publishing Co.

SOFTWARE

CAREER DIRECTIONS
IBM Personal Computer Division

CORPORATION JOB GAME (CAREER DEVELOPMENT SOFTWARE, INC.)
Microcomputer - Apple/TRS-80. Number of Drives Required - 1. Software Memory Requirements - 48K. Special Peripheral Equipment Needed - none.

"SAFETY IN THE OFFICE" BOOKS

ACCIDENT FACTS 1979 EDITION
National Safety Council

FAMILY SAFETY
The National Safety Council

HELP! FIRST STEPS TO FIRST AID
Janus Publishing Co.

KANSAS VOCATIONAL CURRICULUM -- OCCUPATIONAL SAFETY
Emporia State University
Kansas State Department of Education

SAFETY GUIDE
East Texas State University
Occupational Curriculum Laboratory

THE OFFICE (PROCEDURES AND TECHNOLOGY)
Oliverio and Pasewark
South-Western Publishing Co.

WORK: PATHWAY TO INDEPENDENCE
American Technical Society

PRACTICE SETS

DEVELOPING SHOP SAFETY SKILLS
American Association for Vocational
Instructional Materials

GROUP INSTRUCTION FOR COOPERATIVE PROGRAMS
State Department of Vocational and
Technical Education
Curriculum and Instructional Materials Center

STUDENTS' PERSONAL ADJUSTMENT TO WORK
Instructional Materials Services
University of Texas

SOFTWARE

COMPUTER CHECK UP
Microcomputer - Apple. Number of Drives Required - 1. Software Memory Requirements - 48K. Special Peripheral Equipment Needed - none.

COPY II PLUS
Microcomputer - Apple II. Number of Drives Required - 2. Software Memory Requirements - 48K. Special Peripheral Equipment Needed - none.

DISK HEAD CLEANER
Microcomputer - Apple. Number of Drives Required - 1. Software Memory Requirements - 48K Special Peripheral Equipment Needed - none.

LOCK SMITH
Microcomputer - Apple. Number of Drives Required - 1. Software Memory Requirements - 48K. Special Peripheral Equipment Needed - None.

"LEADERSHIP SKILLS" BOOKS

BUSINESS LETTERS AND REPORTS
Bobbs-Merrill Publishing Co.

CONCEPTS AND SKILLS FOR WORD PROCESSING
Kusek and Anderson-Yates
Harcourt Brace Jovanovich, Publishers

EFFECTIVE BUSINESS AND PROFESSIONAL LETTERS
Prentice-Hall Media

EFFECTIVE ENGLISH AND BUSINESS COMMUNICATION
South-Western Publishing Co.

HUMAN RELATIONS FOR SUCCESS IN BUSINESS.
Milady Publishing Co.

INTRODUCTION TO ADMINISTRATIVE OFFICE MANAGEMENT
Second Edition, Zane K. Quible

WRITING CLEARLY: CONTEMPORARY APPROACH
Charles E. Merrill Publishing Co.

WRITING, LISTENING, SPEAKING, FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing Co.

PRACTICE SETS

BUSINESS COMMUNICATIONS
Activities book and teacher's guide
Glencoe Publishing Co.

BUSINESS LETTER WRITING
Instructive Material Laboratory
Ohio State University

COMPETENCY SKILLS: WRITING ON THE JOB
Filmstrips, cassettes, library kit, teacher's guide
Career Aids, Inc.

JOB WRITING SKILLS
Career Aids, Inc.

ORAL AND WRITTEN COMMUNICATIONS
Career Aids, Inc.

SOFTWARE

COMMUNICATIONS: YOUR BRIDGE TO OTHERS
Disk; Apple II, IIe, or IIc. IBM PC.
Career Aids, Inc.

ON THE JOB COMMUNICATION
Disk; teacher's guide. Apple II, IIe, or IIc; TRS-80 Model III or IV.
Career Aids, Inc.

I. SOURCES OF EMPLOYMENT

- A *Classified section* of the newspaper
    - 1. Provides the following services:
        - a. Announces vacancies
        - b. Searches for qualified employees
    - 2. Includes the following information:
        - a. Position being advertised
        - b. Qualifications required of the applicant
        - c. Salary that will be paid
- B. *School placement office*
    - 1. A service usually available free of charge
    - 2. Requires applicant to register with the office
    - 3. Maintains and makes available an up-to-date list of employers seeking applicants
    - 4. Arranges for employers to visit and interview applicants
    - 5. Arranges for students to interview with the visiting employer
- C. *Employment agencies*
    - 1. Temporary employment agencies:
        - a. Find the jobs
        - b. Pay persons to work for someone else
        - c. Provide temporary positions
        - d. Charge fees; collected from employing firm
    - 2. Public employment agencies:
        - a. Represent employers
        - b. Accept resumes and applications
        - c. Provide referrals to interested companies for interviews
        - d. Charge no fee
    - 3. Private employment agencies:
        - a. Accept resumes and applications
        - b. Provide referrals to interested company for interviews
        - c. May require either employers who use the agency or applicants who obtain the jobs to pay the fee
- D. *Civil Service announcements*
    - 1. List positions available in government agencies

2. Offer separate announcements for state and federal positions

3. Usually require examinations for state and federal positions

4. May be obtained by contacting the nearest U.S. government office of personnel management

5. City and county announcements available at city hall or county courthouse

E. *Miscellaneous sources*

1. Chamber of Commerce

2. Yellow pages directory

3. Company personnel offices

4. Union halls

5. Company directories and trade journals obtained from library or placement office

6. Personal contact, such as friends, relatives, and work associates:

    a. Often provide possible "leads" to check out
    b. May recommend someone who can be of help

II. ORGANIZING A RESUME

A. *Sections*

1. Arrangement

    a. Include only one topic in each
    b. Label according to the information contained
    c. Provide an aid to the reader in locating information

2. Section title may include:

    a. Educational background
    b. Employment history
    c. References
    d. Personal data
    e. School and community activities
    f. Special skills
    g. Honors and awards

B. *Format*

1. Required sections

    a. Arrangement may vary
    b. Place identification section first
    c. Arrange remaining sections according to the job requirements

2. Optional sections

    a. Personal data

    - b. Extracurricular activities
    - c. Honors and awards

III. WRITING THE RESUME

A. Be *complete* and *concise*

1. Prepare individual resumes if applying for jobs which emphasize different qualifications

2. Limit the resume to one page if possible

3. Include those facts that are significant to the job

B. Omit irrelevant information, such as:

1. Personal data

2. Extracurricular activities unrelated to the job

3. Explanations

4. Self-evaluations

5. Prepare a personal inventory before writing the resume.

C. *Give complete information*

1. Skills

    a. Include office skills such as:

        (1) Keyboarding speed
        (2) Transcription speed
        (3) Computer skills
        (4) Various other operable office machines

    b. List to facilitate quick and easy reading

2. Work experience

    a. Include for each job:

        (1) Name, address, and telephone number of company
        (2) Dates of employment
        (3) Job title
        (4) Name and title of supervisor
        (5) Brief description of duties performed

    b. Include any relevant work experience:

        (1) Military service
        (2) Volunteer work

    c. Begin with present job and work backwards
    d. Omit this section if there is no previous experience.

3. Educational background

        a. Begin with highest level of education completed
        b. Include for each entry:
            (1) Name and address of schools
            (2) Degrees earned and years in which earned
            (3) Year of graduation
            (4) Major area of study
            (5) Courses completed that are relevant to job application

    4. School and/or community activities
        a. Only activities related to the job
        b. Include for each entry:
            (1) Names of organizations
            (2) Offices held
            (3) Years served in office

    5. Honors and awards
        a. Recognition in skills contest
        b. Recognition for outstanding leadership or job performance
        c. Graduation with top honors

    6. Personal data (This section is often omitted.)
        a. Place near the end of the resume
        b. Could include:
            (1) Height
            (2) Weight
            (3) Social Security number
            (4) Health
            (5) Date of birth
            (6) Marital status

    7. References
        a. With each entry include:
            (1) Name and job title
            (2) Address
            (3) Telephone number
        b. Should include three persons who will testify to work abilities. It is best to obtain permission from these persons to use their names.
        c. References may be omitted and the statement "References furnished upon request," may be included below the section title.

D. *Keyboarding the resume*

    1. Use quality bond paper

    2. Prepare resume neatly or have it printed professionally

    3. Arrange information on the resume for ease in reading

    4. Prepare several original copies

IV. LETTER OF APPLICATION

Prepare a letter of application to accompany the resume.

A. *Purpose*

1. Provides opportunity to sell self
2. Serves as initial contact with company
3. Gives employer a first and lasting impression

B. *Content* of letter

1. Paragraph one
    a. Serves as introduction to the rest of letter
    b. Tells what job is being applied for and how applicant learned of job opening
2. Paragraph two
    a. Gives skills
    b. Gives achievements or qualifications
3. Paragraph three
    a. Provides opportunity to be creative and to sell self
    b. Tells what makes applicant, above all others, the right person for this job
4. Paragraph four
    a. Restates interest in job
    b. States interest in arranging personal interview at employer's convenience
    c. Gives specific date for telephone contact to arrange for interview (include telephone number)

V. JOB INTERVIEW PROCESS

A. Begin preparation for interview by *scheduling an appointment*, remembering to:

1. Identify self to person answering telephone
2. State purpose of call
3. Request appointment time at convenience of employer

B. *Prepare a list* of things to do before interview:

1. Prepare resume
2. Get letters of recommendation
3. Have note pad and pen
4. Prepare list of references with current addresses

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5. Prepare list of other information that might be needed to fill out an application

6. Gather information about the company:
    a. Write to company for literature on its history and organization
    b. Talk to employees

C. *Plan wardrobe*:

1. Dress conservatively

2. Be neat and clean

3. Avoid extremes in hair style, clothing, jewelry or makeup

D. *Know self*:

1. Know why the job is wanted

2. Know important facts and data about self

3. Prepare a list of questions to ask

VI. APPLICATION FORMS AND EMPLOYMENT TESTS

A. *Application forms*

1. Read application form before writing any information

2. Use a typewriter or pen to complete the form

3. Fill in every blank on the form

4. Place the letters NA (not applicable) in the space if a statement does not apply

5. Use resume to help in filling out form

B. *Employment tests*

1. Purpose of tests:
    a. Enables skills to be demonstrated
    b. Allows the employer to observe performance under pressure

2. Types of employment tests:
    a. A timed keyboarding test of at least five minutes
    b. Spelling or word usage test
    c. Mailable copy production test
    d. Proofreading test
    e. Personality or aptitude test

VII. JOB INTERVIEW TIPS AND TECHNIQUES

A. *General guidelines*

1. Go to the interview alone (leave friends or relatives at home)

2. Be on time

3. Pay special attention to appearance

B. *Specific guidelines*

1. Introduce self and state purpose of the appointment
    a. If an offer to shake hands is made, firmly shake the interviewer's hand
    b. Remain standing until offered a chair

2. Allow interviewer to conduct the interview

3. Speak in a clear and pleasant voice

4. Look at the interviewer when talking or listening

5. Be confident and relaxed
    a. Place hands on your lap or on the arms of your chair
    b. Avoid nervous habits, such as chewing gum, smoking, "playing" with objects

6. Be truthful and to the point when answering questions

7. Know questions to ask about the company or about the job, such as:
    a. Duties to be performed
    b. Company policies
    c. Other work-related subjects

8. Let interviewer close the interview

VIII. FOLLOW-UP LETTER

A. *Purpose*

1. To thank employer for opportunity to interview

2. To reaffirm interest in the position

3. To inform the employer of your decision

B. *Content* of letter should be brief and concise

1. Paragraph one
    a. Express appreciation for being given opportunity to interview
    b. Include the position for which applied and the date interviewed

2. Paragraph Two
    a. Restate interest in the position
    b. Mention something positive about visit or some unique qualification that would make you the most qualified applicant

3. Final paragraph
    a. Tell the interviewer that you are looking forward to a decision from the company
    b. Restate your address and phone number

IX. TERMINATING EMPLOYMENT

A. The five leading reasons employees are terminated:

1. Absenteeism

2. Lack of interest in the job

3. Continuous costly mistakes

4. Inability to follow instructions

5. Unwillingness to learn

B. When an employee terminates a job by resigning, courtesies are expected to be given to the employer:

1. A formal letter of resignation should be written to employer
    a. Include the exact resignation date
    b. State the reason for leaving
    c. Express appreciation for the opportunity of working for the company
    d. Express appreciation for knowledge and experience gained from working for the company

2. Inform immediate supervisor of job termination at the same time that letter of resignation is written

3. Give at least two weeks' notice of job termination

4. Prepare to leave all tasks completed and all files in complete order

5. Remove all personal belongings from work area

6. Be cooperative and courteous in training replacement

I. TERMINOLOGY

A. *Communication*: the exchange of an idea or a message which results in a high amount of understanding between the sender and the receiver.

B. *Empathy*: the ability to see and feel things from another person's point of view.

C. *Human relations*: refers to the relationships between people.

D. *Human relations skills*: skills that enable you to have positive relationships.

E. *Initiative*: being a self-starter; seeing work that needs to be done, and doing it without waiting to be told to do so.

F. *Positive human relations*: the ability to get along with many different people under varying circumstances.

G. *Self-awareness*: knowing oneself.

H. *Self-image*: mental picture of oneself.

I. *Tact*: a sense of knowing what to do or say in order to maintain good relations with others and to avoid offense.

J. *Tolerance*: the ability to endure irritations, habits, or mannerisms that may be annoying.

K. *Values*: personal beliefs as to what is good or bad, right or wrong.

II. IMPORTANCE OF POSITIVE HUMAN RELATIONS

A. Most of a person's time is spent with other people.

B. This time is happier and more productive if relationships are well adjusted.

C. Approximately 80 per cent of all jobs are lost because of the inability to get along with other people.

III. HUMAN RELATIONS SKILLS

A. Self-awareness

The first step to understanding and accepting other people is to know and accept oneself.

1. *Values*
   a. What is important to you?
   b. What is right or wrong?
   c. What is good or bad?

2. *Strengths and weaknesses*

   a. What are your good and bad points?
   b. What skills do you have?
   c. What personal traits are likeable and which need improvement?

3. *Self-image*

   a. You may feel differently about yourself at times, depending on the situation.
   b. Your self-image is greatly influenced by how other people react toward you.

B. *Communication*

1. *Verbal*

   a. The words used in speaking and writing
   b. Choice of words is important for precise meaning

2. *Nonverbal*

   a. Physical gestures, facial expressions, and tone of voice are forms of non-verbal communication.
   b. They help emphasize or describe the message being communicated.
   c. Feelings most often are effectively communicated nonverbally.

C. *Empathy*

1. Listen to what the other person is saying.

2. Try to put yourself in his/her place to see his/her point of view.

IV. APPLYING HUMAN RELATIONS SKILLS ON THE JOB

A. Employees *who work well* with employer and co-workers are happier and more productive.

B. *Co-workers* are not always those you would choose as friends.

1. Their values may differ from yours.

2. You may not like their lifestyle or personality.

C. It is important to *cooperate* with co-workers. Team efforts are essential.

D. *Respect* another person's right to be different.

E. *Human relations skills* are helpful when unusual circumstances (absentees and rush orders, for example) put excess demands on employees.

1. Be willing to perform extra duties when necessary.

2. Show initiative. Start work assignments you know must be done without waiting to be instructed to do so. Keep busy.

F. A *positive attitude* is "catching" -- it encourages the same in others.

V. POSITIVE RELATIONSHIPS WITH CO-WORKERS

A. *Cooperation*, *consideration*, and *tact* are necessary in working with others.

B. *Suggestions* for developing positive relationships with co-workers are as follows:

1. Know what duties are expected of you and fulfill them.
2. Be willing to help others when extra help is needed.
3. Don't play favorites; respect all co-workers as individuals.
4. Dress and behave in a manner consistent with the accepted office environment.
5. Learn and abide by the office rules and any special privileges allowed to certain individuals.
6. Avoid gossip.

VI. EMPLOYER-EMPLOYEE RELATIONSHIPS

A. It helps to remember that *employers are people*, too. Just like you, they:

1. Have interests outside of work.
2. Have good days and bad days.
3. Like to receive compliments.
4. Sometimes have difficulty accepting criticism.

B. *Respect*, don't fear, your supervisor. (Remember that the supervisor probably held a lesser position before becoming a supervisor.)

C. Develop *confidence* in personal ability.

1. Polish skills
2. Take advantage of opportunities to expand your knowledge by enrolling in college classes or by reading and researching on your own
3. Accept and use constructive criticism as a tool for improvement
4. Maintain a positive attitude about the job and the employer
5. Be honest with yourself about your capabilities and your motives
6. Be straightforward
    a. Discuss concerns, complaints, and suggestions with the supervisor
    b. Go directly to your supervisor with a complaint, not to his/her supervisor
    c. Be loyal to the supervisor and the employing company

I. TERMINOLOGY

A. *Autocratic*: having complete power over others.

B. *Confidence*: strong belief or trust in someone or something else.

C. *Democratic*: all of the people involved in helping to make a decision.

D. *Enthusiastic*: full of interest.

E. *Laissez-faire*: loose rein.

F. *Leadership*: the ability to develop confidence and loyalty in others, cause them to follow willingly, and to lead in a responsible way.

G. *Loyalty*: the condition of being faithful.

H. *Optimistic*: the belief that there is more good than bad in life.

I. *Personality*: the special qualities which make one different from others.

J. *Potential*: the ability that may be developed.

K. *Self-confidence*: the strong belief and trust in oneself.

II. LEADERSHIP STYLES

A. *Autocratic leader* - one person has all of the power and makes all of the decisions.

1. Closely supervises the group
2. Never lets others have a say in the planning, organizing, or control of the group
3. More interested in getting the job done than in respecting the feelings of others

B. *Democratic leader* - all of the people involved in decision-making; individual opinions are considered.

1. Allows group members to express their ideas and opinions
2. Always listens to others
3. Supervises only as needed, allowing individuals to use their own judgment
4. Is considerate of the feelings of others
5. Knows individual's characteristics
6. Rewards group's effort and is tactful when making criticisms

C. *Laissez-faire leader* - very little control by the leader; allows people to do "their own thing" most of the time.

  1. The group or organization does the work with very little control or direction.

  2. This style works well with responsible people who like to work alone.

III. LEADERSHIP ABILITIES

A. Be willing to *assume responsibility*

B. *Take pride* in doing a good job

C. Be a *good listener*

D. Be *fair*

E. *Share responsibility*

F. Use the *talents* of each person in the group or organization to the fullest potential

IV. COMMON LEADERSHIP TRAITS

A. Shows *self-control*

B. Is *honest* and *fair* in all dealings

C. Is *loyal*

D. Takes *responsibility*

E. Is *tactful*

F. Shows *enthusiasm*

G. Is *persistent*

H. Gives clear *instructions* so all will understand

I. *Gets along well* with others

J. Is a *good listener*

K. Always *gives credit* to others for their work

L. Realizes that there are *individual differences* in any group

M. Has a *pleasing personality* and a sense of *humor*

N. Accepts and gives *positive criticism*

O. Is *understanding*

P. Tells others exactly what is *expected*

Q. Makes individuals feel *good* about themselves and their work

V. HOW TO BECOME A LEADER

A. Become a good *follower*

B. Learn your *strong points* and your *weak points*

C. Study the *qualities* that make a good leader

D. *Plan* to work toward becoming a leader

E. *Participate* in the leadership training provided in your student organization for office education

VI. PARLIAMENTARY PROCEDURE PRINCIPLES

A. Parliamentary procedure is a *set of rules* used in order to obtain group consensus in solving problems and making decisions.

B. Parliamentary procedure is used to carry on *orderly group meetings* on the basis of *democratic principles*.

VII. DEMOCRATIC PRINCIPLES

A. The *minority* is guaranteed the right to express its opinion with protection from the majority provided through parliamentary law.

B. The *majority* has the right to decide all issues.

C. The *minority* is expected to *abide* by the decision of the majority.

D. *Debate* of the group must be fair to all present.

E. All *members* of the group are free to debate under the rules established.

VIII. COMMON PARLIAMENTARY PROCEDURE TERMS

A. *Adjourn* to officially close the meeting by a majority vote of those present.

B. *Amending a motion* to change the previous motion.

C. *Chair* - the office of one who presides over a meeting--president, chair-person, speaker.

D. *House* - the members of the group assembled, may be referred to as the assembly.

E. *Meeting* - a gathering of the members to conduct business related to the group.

F. *Minutes* - the official record of what occurred during a meeting.

G. *Main motion* - a proposal by a group member to the house that certain action be taken.

H. *New business* - business brought before the house for the first time.

I. *Pro and con* - for or against a motion or rule.

J. *Pro tem* - acting during the absence of an officer.

K. *Proxy* - a signed statement by a member authorizing another member to vote in his/her absence.

L. *Question* - means by which discussion of a motion made will cease so the presiding officer can call for a vote by the members.

M. *Quorum* - the number of members who must be present to transact business and/or make decisions.

N. *Second the motion* - when a second member of the house approves the main motion.

O. *Table the motion* - to delay decision on a motion.

P. *Unfinished business* - business brought before the house for the second (or more) times.

IX. PARLIAMENTARY PROCEDURE PRACTICES

A. *Main motion*

1. Most common way of bringing business before the house

2. *Steps* in making a motion:
   - a. Rise and request recognition from the chair--appropriate titles include Mr. President, Madam President, Mr. Chairman.
   - b. Receive recognition by the chair.
   - c. Make the motion--"I move that ...."; such terms as "I so move" or "I make a motion" are incorrect.
   - d. Seconding the motion--"Madam President, I second the motion."
   - e. Statement of the question--"It is moved and seconded that ...."; if the question (motion) is debatable, it is then opened for discussion or debate.
   - f. Receive recognition by the president--following recognition by the president, a member is entitled to speak.
   - g. Vote--the final vote is taken after discussion is ended.

B. Organizations, clubs, or associations observe many more rules of parliamentary procedure which are used to conduct business, both more effectively and more efficiently.

X. PLANNING AND CONDUCTING LEADERSHIP ACTIVITIES

A. Activities should contribute to *learning objectives*.

B. Activities should be directed toward *organizational goals*.

C. *Leadership development* should be a major part of all chapter activities. Activities should reflect long-range plans as well as immediate plans.

D. Activities should serve as a means of *public relations*.

E. Activities should reflect the *thinking* of the total group.

F. Activities should *involve* all members.

G. *Chapter advisors* should act only in advisory capacity.

H. Good activities require *time* to develop and be carried out. They should not be done without preparation.

I. *Instructional program* and *chapter success* are inseparable.

J. *Committee work* should contribute to the overall activity program.

K. Chapter success is dependent upon *enthusiasm of officers* and advisors.

L. Chapter activities should *complement* the local school program and benefit all students concerned.

XI. ESSENTIALS OF A GOOD MEETING

A. Be carefully *planned*

B. Be started and ended *on time*

C. Move along with *enthusiasm* and pep to hold the interest and attention of all members

D. Proceed according to the *correct order* of business

E. Be conducted according to *parliamentary procedure*

F. Be held in a *well-lighted, ventilated, comfortable meeting place*

G. Include *well-prepared* committee reports

H. Show that the *officers* know their *responsibilities*

I. STRUCTURES OF MANAGEMENT

A. *Top management*

1. Responsible for directing overall company operations
2. Includes group of administrative officers
3. Maintains overall view of the company

B. *Division management*

1. Subdivided into divisions or departments
2. Implements policies of administrative officers
3. Usually includes vice presidents for each department

C. *Middle management*

1. Consists of managers and supervisors
2. Provides management and supervisory skills for effective operations

II. FUNCTIONS OF MANAGEMENT

III. MANAGEMENT PROCESS

SUCCESSFUL EMPLOYMENT/UNIT OVERVIEW/ORGANIZATIONAL POLICIES

I. PURPOSES OF POLICIES

A. Provide the means for carrying out *management processes*

B. Aid in making decisions

C. Aid in solving problems

D. Provide *consistency* in the operation of a company

II. TYPES OF POLICIES

A. *Payroll practices*

   1. Method of payment
   2. Pay periods
   3. Pay scale
   4. Payroll deductions

B. *Work schedule*

   1. Work hours and overtime
   2. Probationary employment period
   3. Time off
   4. Absences and tardiness
   5. Lunch break
   6. Coffee breaks
   7. Other

C. *Benefits*

   1. Vacations, holidays, and sick leave
   2. Paid health insurance
   3. Workers compensation
   4. Disability insurance
   5. Flexible hours
   6. Pensions

7. Profit sharing

III. PURPOSES OF PROCEDURES

A. *Improve efficiency*

B. *Reduce costs*

C. *Standardize* ways in which work is performed

D. *Aid* in creating a normal and smooth work climate

IV. SOURCES OF INFORMATION

A. *Company manual*

1. Provides general information about the company

2. May contain information, such as history and function of the company, organizational chart, chain of command, names of company executives, and departmental/division executives

B. *Employee manual*

1. May be written as a section in the company manual or as a separate publication

2. Provides information that affects all employees, such as policies regarding work schedules, vacations, sick leave, holidays, and company benefits

C. *Job description manual*

1. Provides information on how to perform specific job duties

2. May include information such as procedures for typing correspondence, ordering supplies, and answering the telephone

V. ORGANIZATIONAL PROCEDURES IN THE AUTOMATED OFFICE

A variety of procedures are used for efficient organization and to control the work flow in the automated office.

A. *Standardized formats*

1. Establish a style of document preparation for all employees to follow

2. Most efficient and economical approach

3. U.S. Postal Service has guidelines for addressing envelopes

B. *Document/media coding*

1. Documents are carefully coded for efficient retrieval in information processing systems.

2. Coding allows documents to be used by many different departments within the company.

C. *In-House Training*

1. Companies provide in-house training to maximize employee knowledge, ability, and productivity:
   a. Orientation program
   b. Job performance training programs

VI. INFORMATION MANAGEMENT

A. A company's management is divided into *subsystems* for efficient supervision.

B. An *information processing system* is responsible for the efficient flow of data, text, and images throughout the company.

C. Information processing systems are usually divided into the following categories:

1. Word/text processing

2. Data processing

3. Records management

4. Reprographics

5. Distribution/transmission

I. ORGANIZATION OF WORK

A. Set priorities

1. Prepare a schedule of work to be completed that day. This may be done the day before.

2. Decide on the order in which the work will be completed.
    a. Rush jobs--work that must be completed.
    b. As-soon-as-possible jobs--important work; does not require immediate action but should be done as soon as time permits.
    c. Routine jobs--work that is completed when time permits and after other, more important tasks have been completed.

3. Be flexible; allow for unexpected work.
    a. Plan each job to be completed.
    b. Gather materials needed to complete the work.
    c. Make notes of any questions to ask, or of special instructions needed to complete the work.

B. Complete the work.

1. Do one job at a time.

2. Follow one job through to completion before beginning another.

II. TIME MANAGEMENT

A. Eliminate time wasters

B. Increase productivity

C. Make better use of resources

D. Increase effectiveness in doing work

E. Increase efficiency

F. Eliminate duplication of effort

III. TIME SAVING TIPS

A. *Organize* work area

1. Desk
    a. Arrange frequently used items on the desk top within easy reach to avoid wasting time.
        (1) Telephone and telephone directory

        - (2) Calendar
        - (3) Current job materials being worked on
        - (4) Pens and pencils
        - (5) Stapler and tape dispenser
        - (6) Reference books
        - (7) Trays for holding work in progress and mail.
        - (8) Calculator

    - b. Arrange supplies in desk drawers depending on use.
        - (1) Top drawer--used to store letterhead paper, memo forms, envelopes, and plain paper
        - (2) Center drawer--used to store paper clips, ruler, pens, erasers, staple remover, scissors, and rubber bands
        - (3) File drawer--used to store frequently used files
        - (4) Other drawers--used to store other miscellaneous supplies and personal items

- 2. Supply cabinet
    - a. Locate near work area
    - b. Store extra supplies on shelves.
    - c. Arrange supplies according to frequency of use.
        - (1) Items used most should be stored at the front of shelves.
        - (2) Heavy items should be stored on lower shelves.

- 3. File cabinets
    - a. Maintain an up-to-date filing system
    - b. Locate frequently used file cabinets near the work area to save time

- 4. Book shelves
    - a. Locate book shelves near work area to save steps.
    - b. Store reference books and materials on shelves to keep desk top clear.

B. *Use reminder devices*

- 1. Calendar
    - a. Note work that must be completed each month.
    - b. Keep track of daily appointments.

- 2. Reminder file
    - a. File cabinet drawer
        - (1) Holds work to be completed daily, monthly, or yearly.
        - (2) Organize by months with folders for each day of the month.
        - (3) Store material in folders according to the date when action must be taken or begun.
    - b. Card file
        - (1) Holds reminders of tasks that must be completed on specific days of a given month.
        - (2) Organize by months, with a card for each day of the current month.
        - (3) Write reminders on file cards and store behind the guide showing the date on which a specific task must be done.
        - (4) Remove the reminder card when the task has been completed.

(5) Rotate the guide showing the name of the current month at the beginning of each month.

3. Schedules

a. Daily schedule--a record of daily work to be completed; organized according to the time at which a task is to be done.
b. Weekly schedule--a record of any work that is completed once a week or once or twice a month, such as computing payroll, or making bank deposits.
c. Long-range schedule--a record of any work that may occur at various times during the year, such as quarterly reports or income tax reports.

C. *Eliminate* unnecessary motion

1. Arrange work area to save time and effort.

2. Keep an up-to-date inventory of all supplies.

3. Restock necessary supplies before beginning work.

4. Eliminate steps or tasks which are no longer necessary.

5. Combine tasks that can easily be done at the same time.

6. Redesign forms, if necessary, to save time.

7. Make use of time-saving equipment, such as office copiers, collators, and paper folders.

8. Complete difficult jobs when you are at your best.

IV. UNDERSTANDING WORK ETHICS

A. *Ethical Conduct* on the Job

1. Provide an accurate account of how time is spent on the job.

2. Show respect for morning and afternoon breaks.

3. Use company equipment properly.

4. Correctly report accidents that happen on the job.

5. Perform required duties even when employer is not present.

6. Wear suitable clothes.

B. *Punctuality* -- Most companies expect employees to be on time for work. This means not only being physically present, but also ready to start work at the appointed hour. Frequent employee tardiness may result in:

1. Work being delayed because your work hasn't been done

2. Co-workers having to do your share of the work

C. *Attendance*

Absenteeism cannot be avoided. Remember to:

1. Be courteous and notify your employer in advance, if possible.
2. Stay at home when sick to get well. Exposing others will worsen the situation.
3. Do not abuse sick days for leisure activities or personal business. Sick days are a privilege.

D. *Loyalty*

1. Stand up for friends and the employer.
2. Work hard at the job to keep the standard high.
3. Do not talk unfavorably to others about the company or job.

E. *Dependability*

1. Get to work on time.
2. Call when missing work.
3. Do what you say you will.
4. Finish work on time.

F. *Honesty*

1. Tell the truth.
2. Express your feelings on a subject and stand by your convictions.
3. Admit your mistakes.
4. Be trustworthy.
5. Give an honest day's work.

V. UNDERSTANDING JOB RESPONSIBILITIES

A. Know the name and job description of your job.

B. Ask questions if certain procedures are not clear.

C. Do not use a trial-and-error process to discover job responsibilities.

D. Ask for a formal job description from the supervisor.

E. If there is no formal job description, it is wise to write one for your own use.

VI. ADJUSTMENT TO JOB RESPONSIBILITIES

A. Be flexible.

B. Understand new job responsibilities.

C. Ask co-workers about new responsibilities.

D. Be sure responsibilities can be met.

    1. Workers may receive conflicting instructions.

    2. Workers may receive instructions they are unable to carry out.

    3. Workers may receive incorrect instructions.

VII. DESIRABLE WORK ATTITUDES

A. Cooperation--Share tasks when appropriate.

B. Initiative--Show interest in developing new job skills.

C. Willingness to learn--Learn everything possible about the job.

D. Willingness to follow directions--Follow directions exactly.

E. Dependability--Be on the job daily and on time.

F. Honesty --A necessity for all employees.

G. Enthusiasm--Like the job and show a sincere interest in job performance.

H. Acceptance of criticism--If deserved, accept criticism.

I. Loyalty--Do not complain. Keep company business confidential.

J. Performance--Do the best job possible.

K. Respect for rules--Obey company rules and regulations.

L. Proper dress--Wear clothes suitable for the job.

I. SAFETY ATTITUDE

A. A *proper attitude* is a *must*.

B. Most accidents are caused by being careless.

C. Everyone must *be on guard* against accidents at all times.

D. Talking and clowning around should be avoided.

   1. Talking and clowning could keep you from being *completely alert* around office machines.

   2. Talking and clowning also makes you more accident-prone.

II. SAFETY RULES

A. Immediately *report* any unsafe condition.

B. *Remove* dangling jewelry when operating equipment.

C. *Ask* the supervisor when unsure about operating equipment.

III. WORKSTATION SAFETY

A. Place sharp objects away from the edge of the workstation so that they cannot be knocked off easily.

B. Office chairs with casters can be dangerous if the employee is not careful.

C. Static-control mats placed underneath the chair can be helpful to protect computers from a power charge.

D. Do not sit or lean on desks or tables.

E. Keep all filing drawers and desk drawers closed when not in use.

F. Be careful that jewelry, neckties, scarves, or hair does not get caught in equipment, including computer printers.

H. Open one drawer of a file cabinet at a time. Always work from either side of the file cabinet, never in front of it.

F. Fill all file cabinets and drawers from the bottom drawer up, instead of beginning with the top drawer.

IV. OFFICE EQUIPMENT SAFETY TIPS

A. Cables and cords should be taped to the desk and should never be extended into open traffic areas.

B. Do not try to repair office equipment. When a piece of equipment is not operating properly, pull the plug and turn the machine off.

C. When plugging or unplugging electrical equipment, hold the electrical plug rather than the cord.

D. Electrical outlets must not be overloaded.

E. Electrical cords should be checked to see if they are frayed, tangled, or damaged.

F. While operating office equipment, do not engage in distracting activities.

G. Know where the power switch is located for the equipment in your workstation area.

H. Know proper eye care habits that can help reduce stress and strain on your eyes while working at a video monitor.

V. WORK PLACE SAFETY

A. Arrange all equipment to permit safe and efficient operation.

B. Keep materials and supplies safely stacked or stored.

C. Keep all hand tools in proper storage area.

D. Dispose of or store all chemicals in a safe place.

E. Keep all floors clean and free from paper and spills at all times.

F. Clean up daily.

VI. EMERGENCY PROCEDURES

A. *First-aid kits* should be kept in convenient places in the office.

B. *Emergency telephone numbers* should be kept handy.

C. A *fire extinguisher*, fire alarm box, and maps of the nearest fire exit should be easily accessible.

D. *Evacuation procedures* for the building should be posted.

E. Be familiar with all emergency exits and memorize your fire escape plan.

F. Know the location of exit stairs, elevator locations and capacity.

VII. WORKING AFTER HOURS

A. Be sure to tell someone you will be at the office late and what time you expect to leave.

B. Work in a well-lit area.

C. Work near a telephone.

D. Have emergency numbers in front of you in case you need them.

E. Lock all doors as you enter the office and secure all windows.

F. When leaving the building, call security and tell them you are leaving.

G. Ask someone to walk with you to your car.

H. Park your car close to the building.

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RESUME WORKSHEET

Complete the resume worksheet form provided with this activity. As you fill in the form, keep your handwriting neat and make sure the information is complete and accurate. Keep this worksheet so that you may use it in completing the following activities.

What kind of job am I looking for (be specific)? ______________________________

____

What are my major skills and/or qualifications? ______________________________

____

____

WORK HISTORY (List most recent jobs first and decide on appropriate time period to cover).

Company and address ______________________________________

____

Date started ____________________ Date left ____________________

Title ____

Job Description
(responsibilities) ____

____

____

Company and
address ____

____

Date started ____________________ Date left ____________________

Title ____

Job Description
(responsibilities) ____

____

____

SUCCESSFUL EMPLOYMENT/ACTIVITY ONE (continued)

Company and address ____________________

____

Date started ____________________ **Date left** ____________________

Title ____________________

Job Description (responsibilities) ____________________

____

____

EDUCATION:

Last education grade completed (give name of school, date, approximate grade average):

____

____

____

Other courses or training received:

____

____

____

VOLUNTEER OR COMMUNITY SERVICE (Indicate organization, position held, duties performed, dates):

____

____

____

PROFESSIONAL ORGANIZATIONS

____

____

____

ANY OTHER SKILLS OR EXPERIENCES NOT INCLUDED ABOVE:

____

SUCCESSFUL EMPLOYMENT/ACTIVITIES TWO, THREE, AND FOUR

ACTIVITY TWO

PREPARING A RESUME

Using the personal inventory form you completed in Activity One, prepare your resume. Be sure to arrange the material in a logical, easy-to-read format and try to include everything you want to say on one page.

ACTIVITY THREE

WRITING A LETTER OF APPLICATION

Following the steps listed in the Unit Overview, prepare a letter of application to accompany the resume prepared in Activity Two.

ACTIVITY FOUR

WRITING A FOLLOW-UP LETTER

Assume you have interviewed for a position. Prepare a follow-up letter to the person with whom you interviewed. Assume that you have not been offered the job, but indicate that you are interested in working for the company.

ASSESSMENT OF LEADERSHIP STYLE

Directions: To find out what kind of leader you will be, place in the space the letter that best describes the way you would act if you were the leader of a work group.

A--Always, F--Frequently, O--Occasionally, S--Seldom, or N--Never.

I would:

______ 1. Act as the speaker of the group.

______ 2. Encourage overtime work.

______ 3. Allow group members complete freedom in their work.

______ 4. Encourage all to do tasks the same way.

______ 5. Permit others to use their own judgment in solving problems.

______ 6. Work the group members as hard as it took to be ahead of competing groups.

______ 7. Speak as a representative of the group.

______ 8. Push members for greater effort.

______ 9. Let the members do their work the way they think best.

______10. Not mind decisions being put off until later if it were necessary.

______11. Speak for the group when visitors were present.

______12. Keep the work moving at a rapid pace.

______13. Turn the members loose on a job and let them go to it.

______14. Push others to increase the work they are doing.

______15. Settle conflicts when they occur in the group.

______16. Represent the group at outside meetings.

______17. Not allow the members freedom of action.

______18. Decide what should be done and how it should be done.

______19. Not mind others thinking I was too tough on them.

______20. Assign group members to particular tasks.

SUCCESSFUL EMPLOYMENT/ACTIVITY FIVE (continued)

______21. Let some deserving members have authority.

______22. Let the members decide when and how to do their work.

______23. Be willing to make changes.

______24. Ask the members to work harder.

______25. Trust the group members to exercise good judgment.

______26. Schedule the work to be done, but distribute it fairly.

______27. Refuse to explain my actions.

______28. Persuade others that my ideas are to their advantage.

______29. Permit the group to set its own pace.

______30. Let them know it will be done my way or not at all.

______31. Act without consulting the group.

______32. Tell the group members that if one rule or regulation is broken by any employee, it will result in his/her being replaced.

SCORING:

Write the number 1 in front of the space if you responded:

A--Always or F--Frequently. Circle the number 1's which you have written in front of the following items:

3, 5, 9, 10, 13, 15, 21, 22, 23, 25, 26, 29

Count the number 1's. This is your score for concern for people. Count the uncircled number 1's. This is your score for concern for task.

People__________________________Task________________________

A high score on "Concern for People" suggests that your leadership style ranges from a laissez-faire style to a democratic style. A high score on "Concern for Task" suggests you tend to have an autocratic leadership style.

WORK ETHICS

Directions: Read the paragraph below and answer the questions that follow.

Liza works at a doctor's office which is next door to a small trucking firm. In order to get to the office, Liza has to walk close to an area where the truck drivers gather. During the first work week, Liza wears a short skirt and a tube top. As she passes the truckers' area, she receives several whistles, shouts, and hand gestures. Not knowing what to do, she just smiles.

For several days thereafter, each time Liza passes the drivers' area, she receives whistles and shouts. The following day Liza quits, explaining to her employer that she was "fed up" with the loud whistles and jokes.

1. What, if any, mistakes did Liza make?

2. What would you do if someone whistled at you for a week?

3. Do you think Liza should have gone to her boss with her problem? Why or why not?

COMPANY POLICIES AND PROCEDURES

DIRECTIONS: Interview an employer in your community regarding company policies and procedures. Ask some of the following questions and record the responses in the spaces provided or on a separate sheet of paper.

1. Does your company provide policy and procedures manuals for your employees? If so, what types of manuals?

2. What are your policies for vacation and sick leave? When may a new employee take them?

3. What types of benefits do you provide for your employees?

4. What policies do you have regarding promotions and transfers?

5. What procedures do you use for handling disciplinary problems?

6. What procedures do you use for interviewing and hiring employees?

SAFETY ATTITUDES FOR THE OFFICE

DIRECTIONS: Select proper attitudes by placing a T for true and an F for false in the space provided at the left of each statement.

______ 1. The reason someone usually gets hurt is due to carelessness.

______ 2. Safety applies only when you are operating office machines.

______ 3. One of 27 office workers is injured on the job every year.

______ 4. Injuries should be reported at once.

______ 5. Accidents don't happen; they are usually caused by people.

______ 6. Only the company is responsible for safety, not the employees.

______ 7. Only 50 percent of office accidents result from unsafe actions by employees.

______ 8. Goals for safety should be clean work areas, use of safeguards, and following safety rules.

______ 9. Clean machines while they are in operation.

______ 10. Never open two file drawers at the same time.

______ 11. Typewriters and computers never cause fires.

______ 12. Ask questions if in doubt about how to do a job in a safe manner.

______ 13. Use tools and equipment only for their intended purpose.

______ 14. Wear the clothing that is correct for the job.

______ 15. Always lift by using your leg muscles.

______ 16. Safety includes proper clean-up and equipment maintenance.

______ 17. It is not your responsibility to clean up spills that you have made.

______ 18. You should tell others if you see them doing something incorrectly or without the proper safety equipment.

______ 19. It takes two people to operate the paper cutter.

______ 20. Safety rules posted on machines are for anyone who uses that machine.

ADVANTAGES OF TIME MANAGEMENT

DIRECTIONS: Write a specific example to illustrate each of the advantages of time management listed below.

FOR EXAMPLE: Increases productivity--planning a specific time period free from interruptions to work on expense reports.

1. Eliminates time wasters

2. Increases productivity

3. Makes better use of resources

4. Increases effectiveness in doing work

5. Increases efficiency

6. Eliminates duplication of effort

SELF-AWARENESS

The better we know ourselves, the better able we are to make conscious choices in our interactions with others. Many words are used to describe the attitudes and behaviors of people. These words can be called dimensions or characteristics of a person.

DIRECTIONS: You are provided below with a list of twenty-one dimensions. Choose the number that best describes how you see yourself.

SCALE:

Never 0

Occasionally 1

Frequently 2

Most of the Time 3

Always 4

1.	Easy to get along with	0	1	2	3	4
2.	Healthy	0	1	2	3	4
3.	Neat, organized	0	1	2	3	4
4.	Punctual	0	1	2	3	4
5.	Creative	0	1	2	3	4
6.	Mature	0	1	2	3	4
7.	Hard-working	0	1	2	3	4
8.	Calm	0	1	2	3	4
9.	Able to enjoy humor	0	1	2	3	4
10.	Well-groomed	0	1	2	3	4
11.	Confident	0	1	2	3	4
12.	Honest	0	1	2	3	4
13.	Respectful	0	1	2	3	4
14.	Responsible	0	1	2	3	4

SUCCESSFUL EMPLOYMENT/ACTIVITY TEN (continued)

15. Considerate 0 1 2 3 4
16. Able to accept criticism well 0 1 2 3 4
17. Able to follow orders well 0 1 2 3 4
18. Work well under pressure 0 1 2 3 4
19. Like to work on a team 0 1 2 3 4
20. Can express thoughts easily 0 1 2 3 4
21. Can express feelings easily 0 1 2 3 4

HUMAN RELATIONS SKILLS

DIRECTIONS: Carefully read each of the situations below. For each situation, prepare a list of at least three human relations skills that you use to solve the problem. Explain why you selected each quality you list.

SITUATIONS

1. You are responsible for the orientation program for new employees at your company. During this orientation session, you try to make new employees feel welcome and inform them of the company's policies, procedures, and benefits.

2. One of your co-workers tends to "take over" and tries to run things. She orders you around and gives you work assignments. You feel she doesn't have the authority to do this. If anything, you should be the one to assign the work since you have the most seniority. Although she is well-organized and works hard, you resent her attempts to "boss" you. You are having trouble working with her without becoming angry.

3. You are the supervisor of the information processing center of a medium-sized company. One of your employees is stealing supplies, such as tape, paper clips, note pads, and pens from the office and taking them home.

SUCCESSFUL EMPLOYMENT/UNIT TEST

1. Define the following terms:

   A. Resume Worksheet

   B. Resume

   C. Letter of application

2. List five sections which may be included on a resume.

3. Identify five successful interview tips.

4. Identify seven human relations skills and explain their importance for success in the business world.

5. Identify five leadership abilities.

6. Identify five qualities of a leader.

7. Define the structures of management.

8. Identify and define four purposes of organizational policies.

9. Describe five techniques for effective time management.

10. Explain safety precautions for working after hours.

SUCCESSFUL EMPLOYMENT/ANSWER SHEET

ACTIVITIES ONE, TWO, THREE, FOUR, FIVE, SIX, AND SEVEN

To be evaluated to the satisfaction of the instructor.

ACTIVITY EIGHT

1.	T	11.	F
2.	F	12.	T
3.	T	13.	T
4.	T	14.	T
5.	T	15.	T
6.	F	16.	T
7.	T	17.	F
8.	T	18.	T
9.	F	19.	F
10.	T	20.	T

ACTIVITIES NINE, TEN, ELEVEN

To be evaluated to the satisfaction of the instructor.

UNIT TEST

To be evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(F)

The student will be provided the opportunity to acquire the concepts and skills involved in keyboarding in business information processing.

OBJECTIVE:	Demonstrate competency in keyboarding by meeting the following standards.	MASTERY	NON MASTERY
1.	Keyboard alphabetic and numeric keys using the touch method.	____	____
2.	Proofread the material produced, locating and correcting errors.	____	____
3.	Operate the functional machine parts and control keys correctly.	____	____
4.	Demonstrate ability to keyboard final copy material from rough-draft material and make all necessary corrections.	____	____
5.	Demonstrate document formatting skill by keyboarding letters and memoranda.	____	____
6.	Demonstrate document formatting skill by keyboarding manuscripts/reports.	____	____
		____	____
		____	____

STUDENT NAME ______________________________

KEYBOARDING/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(1)(F) Acquire the concepts and skills involved in keyboarding in business information processing.

LEARNING OBJECTIVE: Apply basic touch keyboarding skills.

GENERALIZATION: Keyboarding is currently a necessary skill for everyone.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. INTRODUCTION OF KEYBOARD FOR STUDENTS WITHOUT FIRST SEMESTER OF KEYBOARDING/TYPING (use commercially prepared software if possible.) A. Keyboarding on electronic equipment B. Appropriate keyboarding techniques C. Alpha keys on the microcomputer D. Numeric keys on the microcomputer E. Symbol keys on the microcomputer II. REVIEW OF KEYBOARDING FOR STUDENTS WITH PRIOR KEYBOARDING OR TYPING COURSE A. Warm-up drills 1. Alphabetic sentences 2. Numeric and symbols B. Develop keyboarding speed using appropriate drills for level of individual learner. C. Develop keyboarding accuracy using appropriate drills for level of individual learner.	A. **(BEGINNER)** 1. Teacher introduces terms and describes the differences in keyboarding on a typewriter vs. a computer. 2. Teacher demonstrates finger placement and correct typing techniques. 3. Student demonstrates and practices alpha keys, space bar, and return keys according to the software used. 4. Student demonstrates and practices the numbers according to the software package used. 5. Student demonstrates and practices the symbols according to the software package used.	A. **(BEGINNER)** 1. Demonstrate proper keyboarding techniques. 2. Keyboard perfect lines during a timed period. 3. Demonstrate the ability to keyboard paragraphs using the touch method.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
III. PERSONAL COMPUTER FUNCTIONS RELATED TO KEYBOARDING	B. **(STUDENTS WITH PRIOR KEYBOARDING KNOWLEDGE)**	
A. Directional arrows B. Insert and delete C. Word wrap D. Escape E. Control key F. Printer commands	1. Teacher introduces terms and describes the differences in keyboarding on a typewriter vs. a computer. 2. Teacher reviews finger placement and correct typing techniques.	
IV. PRINTING	3. Student practices alphabetic sentences and sentences containing numbers and symbols.	
A. Load paper B. Set paper guides and printer controls C. Page alignment D. Computer keyboard commands to control the printer E. Paper release procedures F. Ribbon replacement G. Print element insertion and removal	4. Student practices speed-building drills. 5. Student practices accuracy-building drills.	

KEYBOARDING/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(F)** Acquire the concepts and skills involved in keyboarding in business information processing.

LEARNING OBJECTIVE: Recognize proofreader's marks and use them in editing keyboarded materials.

GENERALIZATION: Proofreading is an essential skill when keyboarding.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. THE MOST USED PROOFREADER'S MARKS/SYMBOLS A. Transpose B. Insert C. Delete D. Capitalize E. Lower Case F. Close Up G. Insert Space H. Leave In I. Spelling II. TEXT EDITED BY PROOFREADING FOR CHANGES/ERRORS	1. Teacher presents proofreaders marks by handout/overhead transparency/slides, etc. 2. Exercise for student to proofread and mark with appropriate symbols. 3. Students exchange their papers to proofread.	1. Test identifying the proofreading marks. 2. Unmarked exercise for student to proofread and mark with proper symbols; then, correctly recopy.

KEYBOARDING SKILLS/RESOURCES

TEXT/WORKBOOKS

100 MULTI-ETHNIC TIMED WRITINGS: MAKING COURAGE COUNT
Forkner Publishing Co.

101 TYPEWRITING TIMED WRITINGS WITH SELECTED DRILLS
South-Western Publishing Co.

ACQUISITION OF TYPEWRITING SKILLS: METHODS AND RESEARCH IN TEACHING TYPEWRITING AND WORD PROCESSING
Bobbs-Merrill

ADVANCED COLLEGE TYPEWRITING
South-Western Publishing Co.

ADVANCED KEYBOARDING APPLICATIONS
Glencoe Publishing Co.

BASIC INFORMATION KEYBOARDING SKILLS
South-Western Publishing Co.

BASIC KEYBOARDING & TYPEWRITING APPLICATIONS
South-Western Publishing Co.

BASIC TYPEWRITING APPLICATIONS
South-Western Publishing Co.

BASIC TYPEWRITING DRILLS
South-Western Publishing Co.

BUSINESS LETTER TYPING
South-Western Publishing Co.

CENTERING, TABLES AND FORMS
South-Western Publishing Co.

CENTURY 21 KEYBOARDING, FORMATTING, AND DOCUMENT PROCESSING
South-Western Publishing Co.

CENTURY 21 TYPEWRITING: COMPLETE COURSE
South-Western Publishing Co.

COGNITIVE ASPECTS OF SKILLED TYPEWRITING
Springer-Verlag

COLLEGE TYPEWRITING
South-Western Publishing Co.

COLLEGE TYPEWRITING: A MASTERY APPROACH
Science Research Associates, Inc.

CONSULTAMATION, INC.
Gregg Division of McGraw-Hill, Inc.

GLENCOE KEYBOARDING
Glencoe Publishing Co.

GREGG TYPING FOR COLLEGES: COMPLETE COURSE
Gregg Division of McGraw-Hill Book Co.

HOUGHTON MIFFLIN KEYBOARDING AND APPLICATIONS
Houghton Mifflin Co.

HOUGHTON MIFFLIN TYPEWRITING: KEYBOARD MASTERY AND APPLICATIONS COMPLETE COURSE
Houghton Mifflin Co.

ISSUES RELATED TO KEYBOARDING
Data Base

KEYBOARDING: A NO-FAIL MODEL
Business Education Forum

KEYBOARDING FOR EVERYONE
Anaheim Book Co.

KEYBOARDING FOR INFORMATION PROCESSING
Gregg Division of McGraw-Hill, Inc.

KEYBOARDING FOR THE INFORMATION PROCESSOR
Glencoe Publishing Co.

KEYBOARDING IS FOR EVERYONE
Business Education Forum

KEYBOARDING SKILLBUILDER
Glencoe Publishing Co.

KEYBOARDING/TYPEWRITING
Glencoe Publishing Co.

KEYBOARDING/TYPEWRITING FOR PERSONAL APPLICATIONS
South-Western Publishing Co.

LABORATORY MATERIALS
South-Western Publishing Co.

LEARNING MICROCOMPUTER KEYBOARDING
The Balance Sheet

LEARNING TO KEYBOARD: MICRO-TUTORING VS./AND "LIVE" INSTRUCTION
Century 21

LETTERS AND MEMOS
South-Western Publishing Co.

MARKET SQUARE LEGAL CENTER: A LEGAL TYPING SIMULATION
Houghton Mifflin Co.

MERCURY SYSTEMS
Gregg Division of McGraw-Hill, Inc.

MICROCOMPUTER TYPEWRITING IN BUSINESS EDUCATION
Business Education Forum

MICROWORLD
South-Western Publishing Co.

MODERN COLLEGE TYPEWRITING: A COMPLETE COURSE
Harcourt Brace Jovanovich, Inc.

PALEMETTO INSURANCE COMPANY
South-Western Publishing Co.

PLEASURE ISLAND: A TYPEWRITING SIMULATION
Houghton Mifflin Co.

PROFESSIONAL AND PERSONAL KEYBOARDING AND TYPEWRITING
South-Western Publishing Co.

PROFESSIONAL AND PERSONAL TYPING
South-Western Publishing Co.

PROOFREADING PRECISION
South-Western Publishing Co.

REPORTS, MINUTES AND SCHEDULES
South-Western Publishing Co.

SIDEWALK SURFIN': A TYPEWRITING SIMULATION
Houghton Mifflin Co.

TEACHING KEYBOARDING TYPEWRITING
Delta Pi Epsilon

TEN-KEY TOUCH DRILLS
Glencoe Publishing Co.

TRIPLE-CONTROLLED TIMED WRITINGS
South-Western Publishing Co.

TYPE RIGHT!
Glencoe Publishing Co.

TYPEWRITING: A MASTERY APPROACH FOR IBM SELECTRIC TYPEWRITERS COMPREHENSIVE COURSE
Science Research Associates, Inc.

TYPEWRITING: LEARNING AND INSTRUCTION
South-Western Publishing Co.

TYPEWRITING SPEED/CONTROL BUILDERS
South-Western Publishing Co.

TYPING FROM ROUGH DRAFTS
MPC Educational Publishers

WORD PROCESSING APPLICATIONS IN PRACTICE
South-Western Publishing Co.

WORD PROCESSING CONCEPTS & APPLICATIONS
Gregg Division of McGraw-Hill, Inc.

PRACTICE SETS

AIR COUNTRY INTERNATIONAL TYPEWRITING PRACTICE SET
South-Western Publishing Co.

THE CASTAWAYS-A TYPEWRITING SIMULATION
South-Western Publishing Co.

ENCORE TALENT AGENCY-A TYPEWRITING SIMULATION
South-Western Publishing Co.

A GENERAL OFFICE ASSISTANT SIMULATION-SUNCOAST CIVIC CENTER
South-Western Publishing Co.

A GENERAL OFFICE ASSISTANT SIMULATION-TSR TOWERS, INC.
South-Western Publishing Co.

GYMNASTICS UNLIMITED-TYPEWRITING PRACTICE SET
South-Western Publishing Co.

JEANS GENERATION, INC.-A TYPEWRITING SIMULATION
South-Western Publishing Co.

KEYBOARDING/TYPEWRITING
Glencoe Publishing Co.

METROPLEX CLINIC: A MEDICAL TYPING SIMULATION
Houghton Mifflin Co.

MICROCOMPUTER OFFICE PRACTICE-TRONICS, INC.
South-Western Publishing Co.

TYPE RIGHT!
Glencoe Publishing Co.

TYPING FROM ROUGH DRAFTS
MPC Educational Publishers
John Wiley & Sons Co.

SOFTWARE

ALPHABETIC KEYBOARDING
Apple II, IIe, Franklin; 2 diskettes
South-Western Publishing Co.

GREGG KEYBOARDING FOR INFORMATION PROCESSING
Apple II, 3 diskettes
Gregg/McGraw-Hill and Control Data Corp.

GREGG TYPING, SERIES EIGHT, TIMED WRITINGS
Microcomputer: IBM PC or XT
Software Memory Requirements: 128k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer (Optional), DOD 2.0 or higher
Gregg Division of McGraw-Hill Book Co.

HOUGHTON MIFFLIN TYPEWRITING DRILL AND PRACTICE SOFTWARE
Microcomputer: Apple IIc, IIe; IBM PC, XT
Tandy 1000
Software Memory Requirements: 128k
Number of Drives Required: 1
Special Peripheral Equipment Needed: 80-column printer
Houghton Mifflin Co.

HOUGHTON MIFFLIN TYPEWRITING TIMED WRITING SOFTWARE
Microcomputer: Apple IIc, IIe, IBM PC, XT
Tandy 1000
Software Memory Requirements: 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: 80-column parallel printer, Class Management Disk
Houghton Mifflin Co.

KEYBOARD MASTER
Apple II, IIe
Encyclopedia Britannica Educational Corp.
Software Center

KEYBOARDING FOR THE INFORMATION PROCESSOR
Microcomputer: Apple IIc, IIe, II+; IBM PC
Glencoe Publishing Co.

KEYBOARDING FOR THE PHYSICALLY HANDICAPPED
Microcomputer: Apple II+, IIe or IIc;
TRS-80 Model III or 4; IBM PC or PC jr.
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer (Optional) DOS
Gregg Division of McGraw-Hill Book Co.

KEYSTROKES: KEYBOARDING FOR INFORMATION ENTRY
Microcomputer: Apple II, II+, IIc or IIe; IBM PC; TRS-80 Model III or 4
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Houghton Mifflin Co.

MASTER TYPE
Microcomputer: Apple, Commodore 64, IBM PC
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

MICROCOMPUTER KEYBOARDING
Apple II, IIe, Franklin; 4 diskettes
South-Western Publishing Co.

PACING SOFTWARE FOR PROGRESSIVE TYPEWRITING SPEED PRACTICE
Microcomputer: IBM PC or XT
Software Memory Requirements: 128k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Gregg Division of McGraw-Hill Book Co.

SMARTYPE-A KEYBOARDING PROGRAM
Microcomputer: Apple II Plus
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer (Optional), Language Card
Gregg Division of McGraw-Hill Book Co.

SUPERKEY
Microcomputer: Apple, Apple Classpack
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPE!
Microcomputer: Apple, C64, IBM
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPING IS A BALL, CHARLIE BROWN
Microcomputer: Apple, Commodore
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPING TUTOR III
Microcomputer: Apple, Commodore 64, IBM PC
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

KEYBOARDING/UNIT OVERVIEW

I. TERMINOLOGY

A. *Backspace*: moving printed point to the left one space at a time by striking/entering the backspace/left arrow key once for each character or space.

B. *Central Processing Unit (CPU)*: the "brain" or internal operating unit of a computer system.

C. *Control Key* (*Ctrl*): a key that is depressed at the same time as another key, causing the key to perform a special function.

D. *CRT* (*Cathode-Ray Tube)*: a TV monitor-like screen used to display data; also a VDT, display screen or monitor.

E. *Cursor*: a square, line, or dot that shows on the display screen the point where the next symbol, number, letter, or space will be entered.

F. *Daisy Wheel*: a printing wheel resembling a daisy used on some typewriters and printers.

G. *Delete*: a key to remove a character, a word, a phrase, or a line from the text. Also, one can remove a line, a sentence, or a page with the Delete Function Key.

H. *Disk* (*Diskette):* a square envelope or plastic container which contains a magnetic, Mylar-coated record-like disk. This disk is used for recording, reading, and writing by the CPU.

I. *Disk Drive*: the unit into which a disk is inserted to be read or written upon by the CPU.

J. *Double Space (DS)*: leaving one blank line space between displayed or printed lines of copy.

K. *Edit*: the rearranging, changing, correcting, and proof-reading of existing text.

L. *Element*: a ball-shaped printing device containing the alphabet, numbers, and symbols. This element is found on many electric and electronic typewriters.

M. *Enter or Key*: to input keystrokes into the CPU.

N. *Enter Key* (*Return Key):* a key which causes the cursor to move down and to the left margin.

O. *Escape Key* (*ESC*): a key on some computers which allows the operator to go from one menu function to another.

P. *Format*: the arrangement, placement, and spacing of a document.

Q. *Function Keys*: special keys that when used alone or in combination with other keys allows special functions such as centering, underlining, etc.

R. *Gross Words a Minute (GWAM)*: keyboarding speed measurement. GWAM equals to total, standard 5-stroke words keyed, divided by the time to key or type those words.

S. *Hardcopy*: printed paper output of a computer, word processor, or typewriter.

T. *Indent*: to move in from the margin such as in the first line of a paragraph.

U. *Input*: keying text/data into a computer or typerwriter.

V. *Insert (Ins)*: adding additional characters, words, spaces, or lines to existing text.

W. *Keyboard*: the arrangement of alphabetic and numeric keys on a "board" for inputting information into a computer, dedicated wordprocessor, or typewriter. Also, the act of keyboarding or typing.

X. *Memory*: storage location in a computer, electronic typewriter, or word processor.

Y. *Menu*: a list of program functions which may be selected by the operator.

Z. *Monitor*: see CRT.

AA. *Output*: the hardcopy (printed copy) produced from inputting data into a computer or typewriter.

BB. *Print*: to produce hard copy (paper copy) from a computer or word processor.

CC. *Printer*: equipment attached to a computer or word processor that produces hardcopy.

DD. *Prompt*: a message displayed in the window of an electronic typewriter, or on the screen of a word processor or computer, telling the operator that the machine is awaiting a specific response.

EE. *Retrieve*: to obtain stored information.

FF. *Return/Enter Key*: a key, when struck, causes the machine to move to the left margin and down to the next line.

GG. *Software*: instructions that tell the computer word processor operating instructions/ commands.

HH. *Source Document*: original copy from which a machine operator keys information into the electronic typewriter, computer, or word processor.

II. *Store*: to save information on a magnetic media so that it may be used later.

JJ. *Text-Date Entry*: the process of keying information into the computer or word processor.

KK. *Word Processing*: the writing and storing of letters and other documents on a computer, electronic typewriter, or word processor.

II. INTRODUCE THE COMPUTER KEYBOARD INTRODUCTION TO STUDENTS WHO DO NOT HAVE KEYBOARDING SKILLS (BEGINNERS)

A. Compare the *computer keyboard* and *electronic keyboard*

1. Note differences (this depends on the make and model of the equipment.)
    - a. Location of functions keys
    - b. Location of numeric pad/keys
    - c. Location of escape, delete, insert, control keys
    - d. Location of tab, backspace, shift lock, and enter/return keys
    - e. Location of directional keys
        - (1) Tab (right or left direction)
        - (2) Backspace (left direction)
        - (3) Up or Home (this depends on the computer)
        - (4) Down or End (depends on brand of computer)
        - (5) Left or Page Up (depends on computer brand)
        - (6) Right or Page Down (see above note)

B. CORRECT KEYBOARDING TECHNIQUES

1. Bend at hips
2. Back straight
3. Knees bent, feet to back
4. Fingers curved over homerow keys (ASDF JKL;)
5. Right thumb operates space bar
6. Elbows at side of body
7. Heels of hands off the keyboard or table
8. Eyes on copy

C. Use of *special keys* on microcomputer

1. Esc--return to the menu
2. Tab right/left--move cursor with space bar
3. Ctrl--used with other keys for special function
4. Shift--depress with alpha key to make capitals
5. Backspace--move cursor one space to the left
6. Enter/Return--move cursor back to left margin

7. Caps Lock--enables operator to type in all CAPS
8. Ins--insert a space/letter/word/sentence/paragraph
9. Del--remove a space/letter/word/sentence/paragraph
10. Home--back to beginning of document
11. Pg Up--document goes up one full screen
12. Pg Dn--document goes down one full screen
13. End--down to the end of the document
14. Function--performs a special operation (depends on the software program used)

D. Use of *alpha keys* on the microcomputer

1. alphabetic arranged as typewriter keyboard
2. Q = pause--printing pauses
3. S = ScrLk--screen does not move
4. E = echo--sound
5. B = break--interrupt software program
6. P = PrtSc--prints onto hardcopy what is on screen

E. Use of *numeric/symbol keys*

1. figure 1 = exclamation and special function 1 (depends on the software program used)
2. figure 2 = at sign and special function 2
3. figure 3 = number sign and special function 3
4. figure 4 = dollar sign and special function 4
5. figure 5 = percent sign and special function 5
6. figure 6 = caret sign and special function 6
7. figure 7 = ampersand and special function 7
8. figure 8 = asterik and special function 8
9. figure 9 = left parenthesis and special function 9
10. figure 0 = right parenthesis and special function 10

III. REVIEW OF KEYBOARD FOR STUDENTS WITH PRIOR KNOWLEDGE OF KEYBOARDING/TYPING SKILLS

A. Keyboards of different types of equipment
  1. Dedicated word processor
  2. Microcomputer
  3. Electronic typewriter
  4. Electric typewriter

B. Special drills
  1. Alphabetic
    a. Words
    b. Sentences
  2. Accuracy and speed

C. Timed writings

IV. OFFICE STYLE PRODUCTION ASSIGNMENTS

A. *Beginners*
  1. Letter placement
  2. Word division rules
  3. Formatting guides
  4. Production material

B. *Students with keyboarding/typing skills*
  1. Placement guides
  2. Production materials

V. MOST USED PROOFREADER'S MARKS OR SYMBOLS

A. *Transpose*: reverse or turn around

B. *Insert*: put letter in

C. *Delete*: take out a space, character, line

D. *Capitalize*: letter or entire word in capital letters

E. *Lower case*: make letter(s) small

F. *Close up*: remove space between words or letters

G. *Insert space*: put a space between words or letters

H. *Leave in*: change mind to leave word/words in

I. *Spell out*: spell word out

VI. PROOFREAD MATERIAL

A. Letters

B. Memos

C. Reports

D. Original *written* material

KEYBOARDING/ACTIVITY ONE

DIRECTIONS: Set up the following letter in block style; then, edit the letter to use the AMS style. (Refer to your notes for the elements of both styles.)

Use the current date. This letter goes to Pete C. Neal, 6112 Rustic Oak Drive, Austin, Texas 78748. *Referring to your notes*, supply the correct *salutation* and use *mixed punctuation*.

Some time ago we had the pleasure of sending you full information about our fencing equipment. So far we have not received any reply or request for material.

I am sure you are aware of the fact that our merchandise is well known all over the country. Every article is carefully manufactured in order to obtain the highest possible value for the money.

If you are interested, we are always glad to send you, on approval, samples of our uniforms, and accessories. You are free to examine them for any length of time, and your money will be refunded to you should any article not meet with your approval.

We hope that we may hear from you as soon as you receive this letter.

You can be sure that your order will be filled on the day it is received if it arrives by 4 p.m.

Yours very truly,

(Use your name as the writer.)

PROCEDURE:

1. Run a spelling check (according to the software you use).
2. *PROOFREAD* for content errors. (Content errors = words that are spelled correctly but do not mean what is implied.)
3. Proof for the correct style and spacing.
4. Now, revise by making the style an *AMC style*.

KEYBOARDING/ACTIVITY TWO

DIRECTIONS: Set up the following letter in AMS letter style. Use the current date and refer to your notes for formatting information. Use open punctuation.

This letter goes to Ms. Sylvia Wood, Suite I03, First City National Bank Building, 1101 Main Street, Houston, TX 77001. (Supply correct salutation).

Our organization is planning a dinner party for the civic leaders of our community. We extend an invitation to you to join us at the party. Each year many fine activities are carried through by individuals like you who give so much of your time.

The Governor will be the speaker at the dinner. If you have heard the Governor, you know that he is a fine speaker. If you have not had the pleasure of hearing him, we know that you will thoroughly enjoy the opportunity to hear him.

As president of one of the most important organizations in this town, you will sit at the head table. We are looking forward to having you with us. We hope you can be with us. The details of the dinner and a reservation form are enclosed.

Sincerely yours,

(Your name as the writer.)

Enclosures--2

PROCEDURE:

1. *Run a spelling check*. (Process depends on your software.)
2. *Proofread* for content errors.
3. *Correct* for correct style according to your Letter Information
4. *Print* out the *AMS letter*.
5. *Edit* the *AMS* style to make it *Block style*.
6. *Edit* the letter so that the right margin is even; refer to the *Word Division Rules*.
7. *Print* out the edited block letter.

KEYBOARDING/ACTIVITY THREE

MEMORANDUM

An interoffice memorandum is used when one individual wants to send a message to another individual within a business or organization. The words DATE, TO, FROM, SUBJECT (or similar words) are usually printed on the top of the paper/stationery used for interoffice communications. This is also referred to as the HEADING.

Although the side margins should be approximately equal in width, no effort is made to center the memorandum (memo) vertically. There is no salutation or complimentary close. But each message should be signed by the writer, either beside his typewritten name in the heading or immediately below the last line of the message.

Usually the message is SS (single spaced) and DS (double spaced) between paragraphs. DS after the heading before beginning the message. Space twice (2) after the guide words (TO:, FROM:, DATE:, AND SUBJECT:).

DIRECTIONS: Key the following information onto the memo form that is on the next page. Refer to your Memorandum Information sheet for guidelines.

Use current date; this goes to Lee Laws, is from James C. Scott, and is about the **Equipment and Supplies List.**

A list of the equipment and supplies needed by the Filing Department is enclosed. Although the list is rather long, I have eliminated some of the items that were in our original list in an effort to save money on this particular expense.

This is a minimum list. All the items included are essential if the Filing Department is to function adequately as a service department. I will be glad to discuss this with you at your convenience. Please call me on Extension 545.

Your approval of the request in its entirety will be needed before I can submit this to the Purchasing Department.

TO:

FROM:

DATE:

SUBJECT:

KEYBOARDING/ACTIVITY FOUR

GUIDELINES FOR ONE-PAGE REPORT

1. Begin approximately two-inches from the top of the page. (Be sure to allow for the automatic spacing when printing.)
2. Use a 70-space line.
3. Type and center the title in ALL CAPS.
4. If there is a subheading or byline, it is typed a double space after the main title and in lower case, except for the initial letter.
5. Double-space the body of the report.
6. Since the body is double-spaced, indent the first line of the paragraph five (5) spaces.
7. Be sure to run a spelling check and proofread the work when the information has been input into the computer.
8. Refer to the Word Division Rules (with letter information).

DIRECTIONS: Key the following one-page report onto your storage disk. After you have keyed in the information, run a spelling check and proofread for content errors before you print the report.

The title is **POSITIVE WORK ATTITUDE**

One of the important factors in success is your attitude toward your job. A positive work attitude can be the difference between success and mediocrity. If you like your work, you will have a positive attitude; if you dislike it, your attitude will be negative. No one likes to be around a negative person. This is just as true in business as it is in personal relations. If you complain, if you say it can't be done, you will be defeating yourself.

Every beginner has a lot to learn; but if your attitude is favorable, you will learn faster and your learning time will be excused by others.

A good work attitudde includes enthusiasm. Enthusiasm is nothing more than positive energy. The best part of enthusiasm is that it is "catching." If you are enthusiastic, a co-worker may find his "down-in-the-dumps" feeling has disappeared. Enthusiasm is a trait that contributes a major share to what goes into success.

A positive attitude means, "I can; I will; I did!"

KEYBOARDING/UNIT TEST

DIRECTIONS: Fill in the blank with the correct word/words.

1. The style of letter with all parts at the left margin is ________.
2. TO:, FROM:, SUBJECT:, and DATE: in the memo is called the ________.
3. The style of punctuation with colon after the salutation and comma after the complimentary close is ________.
4. Communication between individuals within a company is a ________.
5. In a memo, omit the complimentary close and the ________.
6. Divide words between ________.
7. If in doubt about word division, consult a ________.
8. In the AMS letter style, omit the ________.
9. Also omit the ________ in the AMS letter style.
10. A report is ________ spaced for ease in reading.
11. Always ________ space the body of a letter.
12. ________ space between the inside address and salutation in a letter.
13. ________ space between paragraphs in a letter.
14. Space ________ times between the complimentary close and writer's name.
15. ________ space after the title of a report.
16. Type the title of a report in ________.
17. Indent the ________ line of each paragraph in a report.
18. The title after the main heading in a report is the ________.
19. The proofreader's mark/symbol for inserting a space is ________.
20. The proofreader's mark/symbol for lower case is ________.
21. The proofreader's mark/symbol for inserting a letter is ________.
22. The proofreader's mark/symbol for "leave as is" is ________.
23. The proofreader's mark/symbol for turn around is ________.
24. The proofreader's mark/symbol for all CAPS is ________.

25. Circle the errors in the following paragraph and retype it correctly on a separate page.

Selecting a career goal is knot a easy decision four young people. If a full- time job si desired immedirely upon high school graduation, that career decision nust be make ratehr early If some college education is an possibility, than the career choise can sometimes be delayed. However, young students, as well as those pesons all raedy employed , must realize that some career changes may be espected.

KEYBOARDING/ANSWER SHEET

ACTIVITIES

Evaluated to the satisfaction of the instructor.

UNIT TEST

1. Block
2. Heading
3. Mixed
4. Memo
5. Salutation
6. Syllables
7. Dictionary
8. Salutation
9. Complimentary close
10. Double
11. Single
12. Double
13. Double
14. Four
15. DS or TS
16. All caps
17. First
18. Subheading
19. $\overset{\#}{\wedge}$
20. lc
21. ∧
22. STET
23. ∽
24. ≡
25. Selecting a career goal is not an easy decision for young people. If a full-time job is desired immediately upon high school graduation, that career decision must be made rather early. If some college education is a possibility, then the career choice can sometimes be delayed. However, young students, as well as those persons already employed, must realize that some career changes may be expected.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(A)

The student will be provided opportunities to: demonstrate concepts and skills related to effective communication and production of business documents.

OBJECTIVE:	Demonstrate proficiency in business English, spelling, and proofreading.	MASTERY	NON MASTERY
1.	Demonstrate correct knowledge of the use of parts of speech, subject-verb agreement, and sentence construction.	____	____
2.	Demonstrate correct application of guidelines for expression of numbers and abbreviations.	____	____
3.	Apply correct punctuation rules to learning activities and document production.	____	____
4.	Demonstrate knowledge of correct capitalization rules.	____	____
5.	Apply correct usage of possessives to learning activities.	____	____
6.	Present a three to five minute oral report to the class.	____	____
7.	Prepare a written report including a bibliography and title page.	____	____
8.	Describe the criteria for composing a well-written business letter.	____	____
9.	Compose a business letter by first outlining and then writing.	____	____
10.	Compose and format a letter of request.	____	____
11.	Compose and format a letter of goodwill.	____	____

12. Compose and format a letter of positive response.	______	______
13. Compose and format a letter of negative response.	______	______
	______	______
	______	______

STUDENT NAME ____

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Using appropriate parts of speech, correct subject-verb agreement, and accurate construction of sentences, demonstrate the correct use of business English.

GENERALIZATION: Mastery of the correct use of English is an important skill required in the business world.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. PARTS OF SPEECH A. Nouns B. Pronouns C. Verbs D. Adjectives E. Adverbs F. Conjunctions G. Prepositions H. Interjections II. SUBJECT-VERB AGREEMENT A. Singular subject B. Compound subject 1. joined by "and" 2. joined by "or" or "nor" C. Each, every, many a D. Singular and plural subjects together E. Collective nouns	1. Discuss the eight parts of speech and how they are used. 2. Complete a worksheet on the parts of speech. 3. Discuss how to achieve subject and verb agreement. 4. Complete a worksheet on subject and verb agreement. 5. Discuss appropriate sentence constructions. 6. Complete a worksheet on sentence construction. 7. Write a short essay on the importance of business English within an office. Use appropriate sentence construction, subject-verb agreement, and use the parts of speech properly.	1. On a written examination, demonstrate knowledge of the correct use of parts of speech, subject-verb agreement, and sentence construction.

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
F. Plural nouns with singular verbs 1. Plural nouns having singular meaning 2. Sums of money, a quantity, or a number		
III. SENTENCE CONSTRUCTION		
A. Long, "run-on" sentences B. Short, choppy sentences C. Concise wording D. Active voice E. Writing clarity		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(1)(A) Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Accurately apply the rules for spelling out numbers as words or expressing numbers as figures, and demonstrate mastery of generally accepted guidelines for abbreviations.

GENERALIZATION: Enhance the clarity of a written document.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. NUMBERS A. Written as words 1. Beginning of a sentence 2. Numbered street names 3. Numbers one through ten 4. Fractions standing alone 5. On-the-hour time B. Written as figures 1. Percentages and discount terms 2. Measurements 3. Dollar amounts 4. A year 5. Day following a month 6. Credit card, telephone, invoice, model, serial, and similar numbers 7. Series of three or more numbers in a sentence 8. Fractions with whole numbers 9. Time expressed with "a.m." or "p.m."	1. Study rules and examples for abbreviating. 2. Using a worksheet, correctly apply the abbreviation rules. 3. Write one sentence for each abbreviation rule. 4. Study rules and examples for writing numbers. 5. Using guidelines for writing numbers, complete a worksheet. 6. Write one sentence for each rule.	1. On a written examination, demonstrate correct application of guidelines for numbers and abbreviations.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
C. Two numbers next to each other: Spell out one and write the other in figures		
II. ABBREVIATIONS		
A. General guidelines		
1. Be consistent		
2. Use a dictionary when in doubt		
B. Rules for personal names		
1. Do not abbreviate personal names		
2. Abbreviate Mister, Doctor, Mistress in front of a person's name		
3. Abbreviate a title used with a first and last name		
4. Abbreviate seniority titles, academic degrees, religious designations when following a name.		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Correctly use standard punctuation marks.

GENERALIZATION: A precise understanding of how to punctuate correctly is an essential skill used in writing business documents.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. COMMAS II. SEMICOLONS III. COLONS IV. HYPHENS V. DASHES VI. PARENTHESES VII. QUOTATION MARKS VIII. OTHER PUNCTUATION MARKS	1. Observe and discuss correct punctuation and its importance for clear communication. 2. Complete a punctuation worksheet. 3. Using a business report or a word processing article, circle and number the punctuation marks. Cite the appropriate rule for each mark. Use a reference manual to assist you. 4. Write a summary of a word processing article. Use the following punctuation marks: period, comma, semicolon, colon, hyphen, dash, and quotation marks.	1. Correctly apply punctuation rules on a written examination.

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Capitalize correctly when writing sentences.

GENERALIZATION: Businesses expect accurate capitalization in business documents.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. FIRST WORD OF A SENTENCE	1. Discuss common capitalization rules and observe correct illustrations of capitalization.	1. Demonstrate knowledge of capitalization rules on a written examination.
II. PROPER NOUNS		
III. MONTHS AND WEEKDAYS	2. Apply the rules using a worksheet.	
IV. TRADE NAMES	3. Write one sentence for each rule presented in class to demonstrate correct capitalization.	
V. HISTORIC EVENTS, ERAS, HOLIDAYS		
VI. HIGH GOVERNMENT OFFICIALS		
VII. TITLES PRECEDING NAMES		
VIII. ACADEMIC DEGREES FOLLOWING A PERSON'S NAME		
IX. TITLES		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Correctly apply the generally accepted guidelines for creating and spelling possessives.

GENERALIZATION: A document with correct spelling creates a positive impression of the company; therefore, companies require accurate spelling.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. NOUN PLURALS	1. Discuss the correct ways to form the plurals of nouns.	1. Demonstrate correct use of possessives and plurals on a written examination.
	2. Complete a worksheet on noun plurals.	
II. NOUN POSSESSIVES	3. Discuss how to create noun possessives.	
	4. Complete a worksheet on noun possessives.	
III. COMMON SPELLING GUIDELINES A. Adding suffixes B. "ie" and "ei"	5. Discuss common spelling guidelines and the use of a dictionary.	
	6. Complete a worksheet by correctly applying common spelling guidelines.	
IV. USING A DICTIONARY	7. Using a newspaper article, magazine article, or business report, circle plural forms and cite each appropriate rule. Use a reference manual to assist in finding the applicable rules.	

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Deliver a three- to five-minute oral report using basic principles of speaking.

GENERALIZATION: Presenting oral reports is an important aspect of today's business environment.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. PREPARATION A. Analyze audience and setting B. Choose topic C. Outline 1. Introduction, body, conclusion 2. Direct or indirect approach 3. Grammar and word choice D. Develop audio or visual aids E. Practice with notes	1. After discussing basic principles of speaking, choose a topic and prepare an outline for an oral report. 2. Discuss and view various audio-visual aids and cite how to use them. 3. Develop one visual aid to support your outline. 4. In groups of three, practice effective delivery using an outline and one visual aid. Discuss what is effective and what needs improving.	1. Use a checklist to evaluate students' presentation of a three- to five-minute oral report using at least one visual aid.
II. EFFECTIVE DELIVERY A. Voice 1. Tone 2. Pace 3. Articulation and projection B. Eye Contact		

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
C. Body Language 1. Dress 2. Posture 3. Movement		
D. Feedback 1. Listening 2. Observing non-verbal communication		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

OBJECTIVE: Write a two- to three-page report on some aspect of text processing, correctly applying guidelines for writing reports

GENERALIZATION: Written reports help communicate important information; therefore, businesses expect employees to construct well-written reports.

CONTENT OUTLINE

I. PREPARING TO WRITE

- A. Determine the report's problem or purpose
  - 1. Scope
  - 2. Limitations
- B. Know your reader
- C. Collect data

II. ORGANIZING IDEAS IN AN OUTLINE

- A. Introduction, body, conclusion/ recommendations
- B. Inductive or deductive approach

III. WRITING

- A. Outline as a guide
- B. Style
  - 1. Objective
  - 2. Clear and concise

LEARNING EXPERIENCE

1. Discuss techniques for writing reports, and view examples.

2. Choose a topic or problem for a two- to three-page report. Define scope, limitations, and identify your reader. Collect data for the report.

3. After determining the topic, considering your reader, and collecting necessary data, prepare an outline.

4. Write the introduction, body and conclusion of the report. Use appropriate footnotes or endnotes. Proofread and edit before submitting a final copy.

5. Complete a bibliography and title page for the report.

EVALUATION CRITERIA

1. Submit a report including a bibliography and title page. Complete a written exam covering techniques for writing reports.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
C. Documentation		
1. Footnotes		
2. Endnotes		
3. Bibliography		
D. Table of contents		
E. Visual aids		
F. Other supplemental parts		
IV. PROOFREADING AND EDITING		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Identify the different types of reports and describe how they are used in business.

GENERALIZATION: Reports play a major role in facilitating communications within the business community.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. INFORMAL REPORTS		
A. Memorandum report B. Letter report	1. Discuss and look at examples of the three types of reports.	1. On a written exam, identify the types of reports and describe the role each plays in business.
II. FORMAL REPORTS	2. List and describe two types of informal reports.	
A. Basic parts 1. Title page 2. Table of contents 3. Body 4. Bibliography	3. List and describe the basic and supplemental parts of formal reports. 4. Compare and contrast informal, formal and oral reports. Discuss how each may be used in business.	
B. Supplemental parts 1. Title fly 2. Letters of transmittal and authorization 3. Synopsis 4. Visual aids 5. List of illustrations 6. Appendix		
III. ORAL REPORTS		

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE:	**EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.
LEARNING OBJECTIVE:	Demonstrate the ability to compose and format letters of goodwill, request, positive response, and negative response according to commonly used standards.
GENERALIZATION:	Businesses choose a specific type of letter according to the specific need of the situation.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TYPES OF LETTERS A. Goodwill B. Request C. Positive response D. Negative response II. COMMONLY USED WRITING FORMULAS	1. Using handouts or overhead transparencies, observe and identify examples of the various types of letters and their formats. 2. Compose and format a letter of request, a letter of positive response, a letter of negative response, and a letter of goodwill.	1. Compose letters of goodwill, request, positive response, and negative response, correctly applying commonly used standards.

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Identify and apply appropriate criteria for composing a business letter.

GENERALIZATION: Employees often must communicate with others through business letters.

CONTENT OUTLINE

I. USE CORRECT GRAMMAR AND PUNCTUATION

II. APPLY THE FIVE C's

   A. Complete
   B. Clear
   C. Correct
   D. Concise
   E. Courteous

III. CREATE AN OUTLINE BEFORE WRITING

LEARNING EXPERIENCE

1. Using worksheets, study and then apply positive wording, concise wording, and reader's point of view.
2. Discuss in class the criteria for composing a business letter.
3. List the criteria for composing a well-written business letter.
4. Within a group, discuss the qualities of a well-written letter using sample letters from the local business community.
5. Outline ideas and write a letter using the criteria discussed in class. Use the simulated situation as described on the worksheet.

EVALUATION CRITERIA

1. Describe the criteria for composing a well-written business letter.
2. Compose a business letter by first outlining and then writing.

BUSINESS COMMUNICATIONS/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
IV. CONSIDER WHEN COMPOSING:		
A. Purpose of letter B. Desired response C. Main topic and supporting ideas D. Sequence of points E. Strong first and last sentences F. Reader's point of view G. Positive wording		
V. REALIZE THE LETTER IS A REFLECTION OF YOUR COMPANY		

BUSINESS COMMUNICATIONS /RESOURCES

TEXT/WORKBOOKS

A BETTER WAY OF WRITING
South-Western Publishing Co.

BASIC ENGLISH FOR BUSINESS COMMUNICATIONS
Glencoe Publishing Co.

BASIC LETTER AND MEMO WRITING
South-Western Publishing Co.

BUSINESS COMMUNICATION
South-Western Publishing Co.

BUSINESS COMMUNICATIONS - A PROBLEM SOLVING APPROACH
Gregg Division/McGraw-Hill Book Co.

BUSINESS CORRESPONDENCE/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH/30
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH AND COMMUNICATION
Gregg Division/McGraw-Hill Book Co.

BUSINESS ENGLISH ESSENTIALS
McGraw-Hill Book Co.

BUSINESS LETTERS AND REPORTS
Bobbs-Merrill Publishing Co.

BUSINESS LETTER WRITING
Instructive Materials Laboratory
Ohio State University

THE BUSINESS OF ORAL COMMUNICATION
South-Western Publishing Co.

BUSINESS SPELLING AND WORD POWER
Bobbs-Merrill Educational Publishing

COMMUNICATIONS AT WORK
South-Western Publishing Co.

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
South-Western Publishing Co.

COURTESY UNDER PRESSURE
South-Western Publishing Co.

DEVELOPING LISTENING SKILLS
Gregg Division/McGraw-Hill Book Co.

EFFECTIVE BUSINESS AND PROFESSIONAL LETTERS
Prentice-Hall Media

EFFECTIVE BUSINESS COMMUNICATION
South-Western Publishing Co.

EFFECTIVE ENGLISH FOR BUSINESS COMMUNICATIONS
South-Western Publishing Co.

ENGLISH STYLE SKILL BUILDERS
Gregg Division/McGraw-Hill Book Co.

ENGLISH THE EASY WAY
South-Western Publishing Co.

HELP WITH BUSINESS ENGLISH
Houghton Mifflin

HUMAN RELATIONS FOR SUCCESS IN BUSINESS
Milady Publishing Co.

JOB WRITING SKILLS
Career Aids, Inc.

ORAL AND WRITTEN COMMUNICATIONS
Career Aids, Inc.

PRO-GRAMMAR/PRO-SENTENCE
South-Western Publishing Co.

PUNCTUATION: A PROGRAMMED APPROACH
South-Western Publishing Co.

SPELLING IMPROVEMENT: A PROGRAM FOR SELF-INSTRUCTION
Gregg Division/McGraw-Hill Book Co.

TYPING MAILABLE LETTERS
Gregg Division/McGraw-Hill Book Co.

UNDERSTANDING HUMAN COMMUNICATIONS
Adler, Rodman, Holt, Rinehart and Winston

WORDS, WORDS, WORDS
South-Western Publishing Co.

WRITING CLEARLY: CONTEMPORARY APPROACH
Charles E. Merrill Publishing Co.

WRITING, LISTENING, SPEAKING FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing Co.

PRACTICE SETS

BASIC WRITING SKILLS FOR BUSINESS
4 filmstrips and cassettes, 16 duplicating masters, teacher's guide, resource manual, and storage container.
Career Aids, Inc.

BUSINESS COMMUNICATIONS
activities book and teacher's guide
Glencoe Publishing Co.

COMPETENCY SKILLS: WRITING ON THE JOB
filmstrips, cassettes, library kit,
teacher's guide
Career Aids, Inc.

CORRESPONDENCE
film trainee work plan
Prentice-Hall Media

DEVELOPING AND IMPROVING WRITTEN COMMUNICATION: WRITING BUSINESS LETTERS
An Audiovisual Package
Occupational Curriculum Laboratory
East Texas State University

JOINING TOGETHER - GROUP THEORY AND GROUP SKILLS
Prentice-Hall, Inc.

PUBLIC SPEAKING
OEA Official Guide

SPEAKING TECHNIQUES
OEA Leadership Development Series

WRITTEN COMMUNICATIONS
OEA Leadership Development Series

WRITTEN COMMUNICATIONS SERIES
slide/tape, guide, and assignments
Instructional Materials Lab
University of Missouri

SOFTWARE

COMMUNICATIONS: YOUR BRIDGE TO OTHERS
disk; Apple II, IIe, or IIc
IBM PC
Career Aids, Inc.

ON THE JOB COMMUNICATION
disk; Apple II, IIe, or IIc; TRS-80
Model III or IV
teacher's guide
Career Aids, Inc.

BUSINESS COMMUNICATIONS/UNIT OVERVIEW

I. TERMINOLOGY

A. *Noun:* Name of person, place, thing, or idea.

B. *Pronoun:* Takes the place of a noun.

C. *Verb:* Shows action or state of being.

D. *Adjective:* Modifies nouns and pronouns.

E. *Adverb:* Modifies verbs, adjectives, and other adverbs.

F. *Conjunction:* Joins words, phrases, clauses, and sentences.

G. *Preposition:* Shows the relation between its object (noun or pronoun) and another word in the sentence.

H. *Interjection:* A word or words used to show a sudden burst of emotion; an exclamation.

I. *Collective noun:* A singular noun referring to a group such as "committee" or "choir".

J. *Active voice:* Action expressed by the verb in the sentence is performed by the subject.

K. *Hyphen:* A short line used to join some compound words or to show word division at the end of a line.

L. *Dash:* A line made up of two hyphens used to emphasize a break in a sentence.

M. *Possessive:* A word showing ownership, origin, or possession.

N. *Suffix:* Syllable(s) added to the end of a word to change its meaning (e.g. remark + able = remarkable).

O. *Direct approach:* Inductive approach; writing from specific to general information.

P. *Indirect approach:* Deductive approach: writing from general to specific information.

Q. *Tone:* Quality or pitch of one's voice.

R. *Articulation:* Clear, distinct formation of words when speaking.

S. *Projection:* Speaking loudly enough for audience to hear.

T. *Scope:* In a written report, the breadth or range of the topic.

U. *Limitation:* Any aspect restricting what is being included in a report.

V. *Footnote:* A reference printed at the bottom of the page referring to a specific portion of the text on that same page.

W. *Endnote:* A reference cited at the end of a report referring to a specific portion of the text. Used in place of a footnote.

X. *Bibliography:* A complete listing of references or sources used to prepare a report.

Y. *Proofreading:* Checking the final copy of a document against original material for mechanical errors.

Z. *Editing:* Analyzing a document for accuracy, coherence, and overall effect; noting any possible revisions.

AA. *Memorandum report:* A short report written in memorandum format used mainly within a company.

BB. *Letter report:* A short report written in letter format usually sent outside the company.

CC. *Title page:* Includes author's name, date, title of report, and sometimes identification of the reader.

DD. *Letter of transmittal:* A message from the author to the reader.

EE. *Letter of authorization:* The message which assigned responsibility of writing the report to the author.

FF. *Synopsis:* A concise summary of the report.

GG. *Appendix:* Additional, but not vital, information added at the end of a report.

II. BUSINESS ENGLISH

A. *Parts of Speech*

1. *Noun*: The name of a person, place, thing, or idea (*e.g. clerk, building, computer, freedom*).

2. *Pronoun*: Takes the place of a noun (*e.g. he, them, it, that*).

3. *Verb*: Shows action or state of being *(e.g. read, understand)*.

4. *Adjective*: Modifies nouns and pronouns (the *new* typewriter).

5. *Adverb*: Modifies verbs, adjectives, and other adverbs. (*e.g.* He understood *completely*.)

6. *Conjunction*: Joins words, phrases, clauses or sentences (Anna *and* Sarah studied together.)

7. *Preposition*: Shows the relation between its object and another word in the sentence. (*e.g.* Robert drove *to* the office.)

8. *Interjection*: Used to show a sudden burst of emotion; an exclamation. (*e.g. Oh!* Now I understand.)

B. *Subject and Verb Agreement*

1. *Singular Subject*: Requires a matching singular verb. (*e.g. Carl walks* to work.)

2. *Compound Subject*

   a. A compound subject joined by "*and*" requires a plural verb. (*e.g. Carl and Jennifer walk* to work.)
   b. A compound subject joined by "*or*" or "*nor*" requires a singular verb. (e.g. Either *Carl or Jennifer works* on Fridays.)

3. "*Each*", "*every*", "*many a*" require singular verbs. (*e.g. Each* of the workers *takes* a vacation during the summer.)

4. When singular and plural subjects are combined, the verb agrees with the subject closest to the verb. (e.g. The president and three *employees are* going to the conference.)

5. *Collective nouns* may be singular or plural. A collective noun is a singular noun referring to a group. If the noun is acting as one unit, use a singular verb. If the members of the collective noun are acting separately, use a plural verb. (e.g. The *class is* on a field trip; but, the *faculty are* working on their lesson plans.)

6. *Plural nouns* with singular verbs

   a. Plural nouns having singular meaning require singular verbs. (*e.g. News travels* quickly.)
   b. Sums of money, a quantity, or a number agree with a singular verb. (*e.g. Fifty pounds is* a lot of weight to gain in one year.)

C. *Sentence Construction*

1. Avoid *long*, "*run-on*" sentences.
   (Run on: Sue and Jane went to see a movie last night and they said it was the worst movie they had ever seen.)
   (Better: Sue and Jane went to see a movie last night. They said it was the worst movie they had ever seen.)

2. Avoid *short*, "*choppy*" *sentences*.
   (Choppy: We completed our work. We went home.)
   (Better: When we completed our work, we went home.)

3. *Be concise*; avoid unnecessary words.
   (Wordy: The undoubtedly highest and widest circus tent in the world was erected this bright and beautiful morning in a field which was once a meadow just outside of town.)
   (Better: The world's largest circus tent was erected this morning just outside of town.)

4. *Use active voice* (the subject of the sentence is doing something) rather than passive voice.
   (Passive: The bill was paid by me.)
   (Active: I paid the bill.)

5. *Use picture words* (words that cause the reader to see exactly what the writer is writing about) and use a variety of words to express an idea.

(Avoid: The squirrel ran across the lawn and up a tree.)
(Better: The furry gray squirrel raced across the snow covered lawn and up the thick trunk of a leafless tree.)

III. EXPRESSION OF NUMBERS AND ABBREVIATIONS

A. *Numbers may be written in figures or spelled out.*

1. Numbers written as words
   a. Beginning of a sentence (e.g. *Twenty-five* students...)
   b. Numbered street names if between one and ten (e.g. *Tenth* Avenue)
   c. The numbers one through ten (e.g. The next *five* students...)
   d. Fractions standing alone (e.g. You should receive *one-third* of the refund today.)
   e. On-the-hour time (e.g. The meeting begins at *one* o'clock.)
2. Numbers written as figures:
   a. Percentages and discount terms (e.g. a *10* percent discount)
   b. Measurements (e.g. a *9*-inch envelope)
   c. Dollar amounts (e.g. Please send *$5.25*.)
   d. A year (e.g. in *1989*....)
   e. A day following a month (e.g. We will leave on *January 6*.)
   f. Credit card, telephone, invoice, model, serial, and similar numbers (e.g. The serial number on the typewriter is *A234893*.)
   g. Series of three or more numbers in a sentence (e.g. There were *20* contestants entered in Shorthand I, *3* entered in Shorthand II, and *10* in Information-Communication I.)
   h. Fractions with whole numbers (e.g. The paper measures *8 1/2* inches across.)
   i. Time expressed with "a.m." or "p.m." (e.g. We will meet at *10:15* a.m.)
3. Write one number in words and the other in figures when two numbers occur next to each other in a sentence. (e.g. There are *four 10-year old* students in the library.)

B. *Abbreviations should be used to save space in such materials as labels, statistical matter, or footnotes.*

1. Spell out personal names.
2. Abbreviate Mister, Doctor, and Mistress in front of a person's name.

3. Abbreviate a title used with a first and last name. (*e.g. Dr.* Arnold Greene, but *Doctor* Greene)

4. Abbreviate seniority titles, academic degrees, and religious designations when following a name. (e.g. Helen Young, *Ph.D.*)

IV. PUNCTUATION

Punctuation marks clarify meaning and make reading easier by stopping the eye or slowing the thought process. Refer to a reference manual when in doubt concerning how to punctuate.

A. *Commas are used:*

1. To separate independent clauses joined by a coordinating conjunction (*and*, *but*, *or*, *nor*).
   (e.g. We are going home, but Jackie will stay with you.)

2. To separate words, phrases, and clauses in a series.
   (e.g. Tammy, Jim, and Mike will attend the meeting.)

3. After introductory words and phrases.
   (e.g Before she made the appointment, she checked her calendar.)

4. To set off parenthetical expressions in sentences.
   (e.g. We are, however, unable to meet with you today.)

5. To set off an appositive.
   (e.g. The director, Jean Moore, attended the meeting.)

6. Between adjectives.
   (e.g. She was a very dependable, competent secretary.)

7. To set off a direct address.
   (e.g. Thank you for your order, Mrs. Turner.)

8. To show omission of words that are easily understood from the context of the sentence.
   (e.g. The first order will be shipped on November 13, and the second, on December 1.)

9. To set off a direct quotation from the rest of the sentence.
   (e.g "The meeting will be held in the conference room," announced the director.)

10. To separate words that are repeated for emphasis.
    (e.g. We are very, very happy about your promotion.)

11. To set off titles, degrees, and seniority designations that accompany a person's name.
    (e.g. Jennifer Schew, M.D., assumes her new position on January 1.)

12. To separate the day of the week from the month, and the month from the year.
    (e.g. Friday, November 13, 1988)

13. To separate thousands, hundred thousands, millions, etc., in numbers consisting of

four or more digits.
(e.g. $1,226,000)

B. *Semicolons are used:*

1. Between clauses in a compound sentence when two clauses are not joined by a conjunction.
   (e.g. The copier is out of order; the drum has to be replaced.)

2. Before a conjunctive adverb (*however, therefore, otherwise*) when the adverb joins two independent clauses.
   (e.g. The copier is out of order; otherwise, you could make the copies you need.)

3. Between independent clauses joined by a conjunction if either or both of the clauses contain internal commas.
   (e.g. Bob, Ted, and Alice will attend the conference in Atlanta; and Diane will attend the one in Dallas.)

4. Between members of series when one or more of the members contains a comma.
   (e.g. The new officers are Debbie Thompson, president; Patricia Johnson, vice president; and William Barnes, secretary.)

C. *Colons are used:*

1. After an expression such as "these" or "the following" when that expression is used to introduce a series of items.
   (e.g. You will need the following items when you take the test: a reference manual, pencil, and paper.)

2. To separate an introduction from a long quotation.
   (e.g. President Kennedy used this quotation in his inaugural address: "Ask not what your country can do for you; ask what you can do for your country.")

3. To introduce lists, tabulations, enumerations, words or phrases.
   (e.g. Do these things before you leave the office: clean up the coffee room, lock the file cabinets, turn off the lights, and lock the door.)

4. Used in place of the words "that is" or "for example" after a statement that introduces an example or an explanation.
   (e.g. We have to make a decision: to leave this work unfinished or to stay late at the office.)

5. After the salutation of a business letter if a comma is used after the complimentary close.
   (e.g. Dear Ms. Glasco:)

6. Between the hours and minutes in clock times that are expressed in figures.
   (e.g. 10:45 a.m.)

D. *Hyphens are used:*

1. In compound numbers from twenty-one to ninety-nine.

2. With the prefixes self, ex, and great.

(e.g. This is a self-contained unit.)

3. With a prefix and a root word that begins with a capital letter.
   (e.g. The countries formed a pro-American alliance.)

4. When compound adjectives come before a noun.
   (e.g. Send me the up-to-date file.)

E. *The dash is used:*

1. To emphasize a word or group of words.
   (e.g. The car was flashy, sleek, powerful--and expensive.)

2. To indicate a break or shift in thought.
   (e.g. That car--the one with the personalized license plate--belongs to the president of the Canton College.)

3. To indicate an omission of letters and words.

4. To connect combinations of letters and figures.

F. *Parentheses are used:*

1. To enclose material that is supplementary.
   [e.g. In the following sentences, circle the correct pronoun (refer to chart 1 on page 55).]

2. To enclose figures.

3. To indicate an enumeration.
   [e.g. You will need the following items: (1) a reference manual, (2) a pad, and (3) a pencil.]

4. To enclose numbers that follow the written number to ensure accuracy.
   [e.g. Thirty-four (34) students will go tomorrow.]

G. *Quotation marks are used:*

1. To indicate a direct quotation of someone else's words.
   (e.g. At the end of the meeting, David said, "Let's meet at this time again next month.")

2. To supply special emphasis to words.
   (e.g. That student has a "can do" attitude.)

3. To indicate the title of a portion of a complete publication.
   (e.g. Please read Chapter 3, "How to Write Business Letters.")

V. CAPITALIZATION RULES

A. *Proper nouns (names of people, specific places, etc.)* (e.g. President Reagan, San Antonio, the East)

B. *Names of the months and days of the week, but never seasons.*
(e.g. April, Wednesday, fall, spring)

C. *Trade names, but not generic names.*
(e.g. Xerox, Frigidaire, copier, refrigerator)

D. *Names of historic events, holidays, and eras.*
(e.g. World War II, Easter, the Renaissance)

E. *Titles of high government officials.*
(e.g. Senator John Bradley)

F. *Titles preceding a person's name, but not titles that follow a name.*
(e.g. President William Brierley; William Brierley, president of Canton College)

G. *Academic degrees following a person's name.*
(e.g. Mildred Starling, M.D.)

VI. SPELLING

A. *Noun plurals are formed:*

1. Add "s" to a singular noun.
(e.g. committee + **s** = *committees*)

2. Add "es" to nouns ending in s, z, ch, sh, or x.
(e.g. business + **es** = *businesses*; tax + **es** = *taxes*)

3. When a noun ends in "y" with a consonant before the y, change y to i and add es.
(e.g. hobby + **es** = *hobbies*)

4. When a noun ends in "y" with a vowel before the y, just add s.
(e.g. attorney + **s** = *attorneys*)

5. When a noun ends in "o" with a consonant before the o, add es.
(e.g. hero + **es** = *heroes*)

6. When a noun ends in "o" with a vowel before the o, add s.
(e.g. duo + **s** = *duos*)

B. *Noun possessives are used to show ownership, possession, or relationship.*

1. Add apostrophe and s ('s) to a singular noun.
(e.g. Karen**'s** book, a day**'s** drive)

2. If a singular, one-syllable noun ends in an "s" or a "z" sound, add apostrophe and s.
(e.g. boss + **'s** = the boss**'s** report)

3. If a singular noun made up of two or more syllables ends in an "s" or a "z" sound,

add only the apostrophe.
(e.g. Mr. Connors + ' = *Mr. Connors'* vacation)

4. When forming the plural possessive of a noun, use two steps: (1) make the noun plural, and (2) make the noun possessive.
    a. If a plural noun ends in s, add an apostrophe.
    (e.g. churches + ' = the *churches'* property)
    b. If a plural noun does not end in s, add an apostrophe and an s.
    (e.g. women + **'s** = the *women's* forum)

C. *Suffixes are added:*

1. Doubling the final consonant:
    a. When a *one-syllable* word ends with a "consonant, vowel, consonant", double the final consonant before adding the suffix.
    (e.g. swim + **er** = *swimmer*)

    Exceptions: do not double the final consonant if the word ends in "w", "x", or "y".
    (e.g. fix + **ed** = *fixed*)
    b. When a word with *two or more syllables* ends with a "consonant, vowel, consonant", double the final consonant **if** the accent falls on the last syllable.
    (e.g. occur + **ed** = *occurred*; refer + **ed** = *referred*)
    (But: refer + **ence** = *reference*)

2. If a word ends in "e" preceded by a consonant, drop the "e" before adding a suffix beginning with a vowel.
(e.g. hope + **ing** = *hoping*)
(e.g. But: move + **ment** = *movement*)

D. *"ie" and "ei" combinations:*
Remember this verse: "i" before "e" except after "c" or when sounded like "a" as in neighbor or weigh.
(e.g. "i" before "e": *yield, view*
except after "c": *receive, ceiling*
or when sounded like "a": *eight, neighbor*)

E. *Spelling Hints*

1. Whenever in doubt about the correct spelling of a word, use a dictionary.

2. Read the guide to the use of your dictionary in order to determine the preferred spelling of a word.

3. Build a "memory help" to remember spellings.
(e.g. There is "*a rat*" in sep*arate*;
"*All*" lines are para*ll*el.)

4. Recognize the prefix and the root of a word.
(e.g. mis + **spell** = *misspell*)

VII. TECHNIQUES FOR PRESENTING ORAL REPORTS

A. *Preparation*

1. *Analyze* the audience and setting.

   a. Consider age, cultural background, knowledge of the topic being presented, and size of the audience.
   b. Determine the amount of time allotted to your report and the location of the presentation.
   c. Adapt your report to the audience and setting.

2. *Choose* the topic.

   a. Determine the objective of the oral report.
   b. List steps to achieve the objective.

3. *Develop* an outline to guide your report.

   a. In this outline, include:

      (1) The *introduction* should gain the interest of the audience and give any necessary orientation to the topic.

      (2) The *body* of the report should take up approximately 75 percent of the speaking time. Most of the facts are presented at this time in a clear, concise delivery.

      (3) The *conclusion* may include a summary of major points and the objective of the report.

   b. Two methods of developing a report are:

      (1) An *inductive approach* begins with the specific objective and moves to more general information to support the objective/purpose.

      (2) A *deductive approach* begins with general information and moves to the specific objective/purpose.

   c. Use correct grammar and adapt choice of words to the audience.

4. *Determine* if there is a need for audio-visual aids.

   a. Decide if the audio-visual aid will help the presentation.
   b. Make sure the audiovisual aid is well-prepared. (*Can the audience hear and/or see it?*)
   c. Examples of audio-visual aids: *graphs, bar charts, audio recordings, videotapes, filmstrips.*

5. *Practice* with notes before delivering the oral report. Become **very** familiar with the report. Do not read notes; use them as a guide.

B. *Effective delivery depends on:*

1. *Voice*

a. Tone: Appropriately vary the pitch of the voice to avoid talking in a monotone.
b. Pace: Present easy-to-understand material more quickly than hard-to-understand information. Use pauses effectively.
c. Articulation and Projection: Speak distinctly and clearly. Make sure the people in the back of the room can hear.

2. *Eye Contact helps credibility and allows feedback from the audience.*

3. *Body Language*

a. Dress appropriately.
b. Use good posture.
c. Use gestures and movement to fit the delivery of the report, but don't overdo it.

4. *Feedback*

a. Listening: Listen carefully to questions and responses. Ask for clarification, if needed.
b. Non-verbal communication: Eye contact with the audience provides non-verbal feedback. Watch the audience for facial expressions, posture, etc.

VIII. TECHNIQUES FOR WRITING REPORTS

A. *Preparing to write*

1. Before writing, determine the problem or purpose of the report.

a. Decide the scope of the problem (*the range of the topic; how much information to include*).

b. Set the limitations of the report (*restrict what is to be included*).

2. Before writing, consider who will be reading the report and adjust the writing to the audience.

3. Collect facts and data before writing. Sources for facts might include library research, interviewing, surveys, other reports, etc.

B. *Outline facts and ideas*

1. Use an introduction, body, and conclusion/recommendations.

2. Determine method of approach, such as inductive method or deductive method.

C. *Writing the Report*

1. Use the outline as a guide.

2. Use a clear, concise, and objective style.

3. *Documentation*: Give credit to the sources of information used in the report.

a. *Footnotes* are references printed at the bottom of the page referring to specific

portions of the text on that same page.
    b. *Endnotes* are references listed at the end of the report referring to specific portions of the text. Endnotes take the place of footnotes.
    c. A *bibliography* is a complete listing of reference sources used to prepare a report.

4. If the report is lengthy, prepare a table of contents which lists major headings/chapters and beginning page numbers.

5. Visual aids may help communicate information. Visual aids might include bar graphs, pie charts, statistical tables, maps, etc.

6. Reports may include a number of other parts.

D. *Proofreading and Editing*

1. *Proofreading* is the examination of printed text to mark errors which need correction. Proofreader's marks are used.

2. *Editing* is the examination of printed text to determine clarity of wording, accuracy of information, and coherence. Editing requires the reader to analyze and judge the communication of the message.

IX. TYPES OF REPORTS

A. *Informal reports are short reports in various forms.*

1. *A memorandum* report is a short report in the form of a memorandum which is used for interoffice communication.

2. A *letter* report is a short report written in letter form generally to someone outside the company.

B. *Formal reports are usually longer than informal reports. The more parts that are included in the report, the more formal the report.*

1. Basic parts of a formal report include:

    a. The *Title page*, which includes the author's name, date, title of the report, and sometimes the identification of the reader.
    b. The *Table of Contents*, which lists the headings and beginning page numbers, as well as the parts of the report which appear before and after the body.
    c. The *Body*, which presents the facts and information; and which discusses the objective/problem.
    d. The *Bibliography*, which lists the references or sources used to prepare the report.

2. Supplementary parts include:

    a. The *Title fly*, which lists only the title of the report.
    b. The *Letter of Transmittal,* which is a message from the author to the reader.
    c. The *Letter of Authorization*, which is the message that assigned responsibility of writing the report to the author.
    d. The *Synopsis*, which is a summary of the report.

        e. *Visual Aids*, which are illustrations that help communicate information visually.
        f. *Appendix*, which provides additional (but not vital) information at the end of a report.

C. *Oral reports or communication are used to transmit information more than any other method. The creation of oral reports begins by using the same research and outline techniques as are used for written reports.*

X. TYPES OF LETTERS

A. *Letters of Goodwill*

    1. Used to thank someone for favorable action, to congratulate someone on a promotion or good fortune, or to promote a favorable impression about your company.

    2. A common format is:

        a. In the introductory paragraph, tell why the letter is being written.
        b. Expand on the information given in the first paragraph.
        c. Draw the entire message to a logical conclusion, leaving the reader with a positive feeling.

B. *Letters of Request*

    1. Ask a person to act in a specific way, to request a particular service or specific information, or to solicit a contribution supporting a stated cause.

    2. A common format is:

        a. State the request in the first paragraph.
        b. Explain why the information or service is wanted.
        c. Motivate the reader to grant the request.
        d. Use a courteous and positive tone to close the letter.

C. *Letters of Positive Response*

    1. Written to fulfill both business and social obligations, to grant a request by another person, and to build goodwill for the company.

    2. A common format is:

        a. Restate and grant the request.
        b. Give additional relevant information.
        c. Draw the message to a logical conclusion using a courteous, positive tone.

D. *Letters of Negative Response*

    1. Written to deny a request while still maintaining goodwill.

    2. A common format is:

        a. Thank the reader for the request.
        b. State and explain the refusal in a polite, positive manner.

        c. Offer an alternative and provide specific information, if possible.
        d. Close the letter using a positive tone.

XI. CRITERIA FOR COMPOSING A BUSINESS LETTER

A. *Use correct grammar and punctuation.*

B. *Apply the five C's*

   1. Complete
   2. Clear
   3. Correct
   4. Concise
   5. Courteous

C. *Outline before writing*

D. *Consider when composing:*

   1. Purpose of the letter.
   2. Response wanted from the reader.
   3. Main topic and supporting ideas.
   4. Sequence of points.

E. *Use common writing guidelines:*

   1. Use strong first and last sentences in the letter.
   2. Consider the reader's reaction and write from the reader's point of view.
   3. Use positive wording; avoid negative words and extra phrases.
   4. Vary the sentence structures.
   5. Promote goodwill.
   6. Use appropriate paragraph length.
   7. Respond promptly to requests.
   8. Proofread and make necessary corrections.
   9. Outline ideas and write letter from the outline.

DIRECTIONS: Underline the correct verb in each sentence to achieve subject and verb agreement.

1. Every member of the committee (was, were) at the meeting scheduled last Thursday.
2. The records manager of First Federal Savings (is, are) scheduled to give a presentation at our next chapter meeting.
3. Neither Beth nor Sarah (is, are) responsible for that part of the annual report.
4. After a very lengthy trial, the jury (was, were) unanimously agreed on a verdict.
5. Grayson and Sons, Inc., (was, were) acknowledged as the newest law firm in our community.
6. Five thousand dollars (was, were) awarded to the person supplying the information which led to the criminal's arrest.
7. Sixty minutes (is, are) not enough time to do the job well.
8. Economics (has, have) been very confusing to a number of people.
9. Bacon and eggs (is, are) one of my favorite breakfasts.
10. Every eligible man and every eligible woman (has, have) the right to vote in November's election.

DIRECTIONS: If the following sentences are written in active voice, write ACTIVE in the blank. If the sentences are written in passive voice, rewrite them in active voice.

1. Albert Farthing High School will add several new courses next fall.

   ____

2. Leslie gave her best friend good advice.

   ____

3. The report was written by Ann Garza.

   ____

4. A worksheet on word processing was completed by Mark.

   ____

5. The staff members have been informed by Al Lewis of the staff meeting scheduled for next Wednesday.

   ____

BUSINESS COMMUNICATIONS/ACTIVITY THREE

DIRECTIONS: If the sentence is CORRECT as written, write correct on the line. If the sentence is not correct, rewrite the sentence making necessary corrections.

1. Melba Lester, M.D., is the one I would recommend.

____

2. The president of the firm is Howard P. Jacobson, Junior.

____

3. Mister Robert T. Simpson will be our guest speaker.

____

4. 34 people from Acme Products, Inc., will be attending the conference "Word Processing for Today."

____

5. Your plane reservation is for six o'clock.

____

6. A two-thirds majority is necessary to win the election.

____

7. On September seventh, we will begin working on next year's budget.

____

8. Please print 200 10-page booklets by next Wednesday.

____

9. Please send me two copies of Invoice 3429.

____

10. We expect 40 to 60 people to apply for the new sales manager's job that was just posted.

____

BUSINESS COMMUNICATIONS/ACTIVITY FOUR

DIRECTIONS: If a plural or a possessive in the sentences below is incorrect as written, write the correct plural or possessive form in the adjoining blank.

__________ 1. Karla's performance at the Arts Festival was excellent.

__________ 2. This summer we will conduct at least six more surveys.

__________ 3. The businessmens' luncheon is being held in rooms 142 and 144.

__________ 4. Because she has sixteen years' experience with this firm, Norma is very knowledgeable about our records management program.

__________ 5. We extend many courtesies to our bank customers.

__________ 6. Many families will be together over the Christmas holidays.

__________ 7. This city's water board just asked for a rate increase.

__________ 8. That text book is the instructor's complimentary copy which she received from the publisher's representative.

__________ 9. There are seven attorneys with the new law firm.

__________10. Sams' radio can be heard throughtout the house.

BUSINESS COMMUNICATIONS/ACTIVITY FIVE

DIRECTIONS: Spell the plural form of each of the following words.

_______________ 1. study

_______________ 2. motto

_______________ 3. year

_______________ 4. attorney

_______________ 5. gypsy

DIRECTIONS: Combine the root word and its suffix. Correctly spell the resulting word. You may have to add or take away letters.

_______________ 6. run + er

_______________ 7. wish + ed

_______________ 8. recur + ence

_______________ 9. like + able

_______________ 10. improve + ment

DIRECTIONS: Circle the following words which are spelled incorrectly.

11. recieve
12. valueable
13. mispell
14. neighbor
15. beige
16. brief
17. conferring
18. sunny
19. paralel
20. taxed

BUSINESS COMMUNICATIONS/ACTIVITY SIX

DIRECTIONS: The following sentences may require punctuation and capitalization. Insert any missing punctuation marks and circle any letter which should be capitalized.

1. In the fall I think I will take english history and typewriting.
2. Our marketing director robert thompson will be a guest speaker at marshall high school.
3. Before coming to san antonio president reagan stopped in dallas.
4. president reagan gave an interesting, lively speech on the middle east however he did seem tired from the traveling.
5. Next month miriam fitch president of fitch industries will be coming to kennedy high school to speak on job opportunities.
6. You will need the following supplies for the next math exam pencil paper and a calculator.
7. Our new class officers are mark morley president karen wilson vice president and andrew warner secretary.
8. Please open the window rhonda.
9. On wednesday march 12 our spanish club will take a trip to mexico city.
10. I can't remember who said to be or not to be that is the question.

BUSINESS COMMUNICATIONS/ACTIVITY SEVEN

DIRECTIONS: Carefully read each of the following sentences and add any necessary punctuation (commas, semicolons, hyphens, underlining, quotation marks, apostrophes, etc.)

1. One horizontal inch equals 12 elite spaces one horizontal inch also equals 10 pica spaces.
2. Claudia has lived in Dallas Texas New Orleans Louisiana and Tulsa Oklahoma.
3. The steps for typing in all capital letters are as follows depress the shift lock type the words release the lock by touching the right shift key.
4. Although some paragraphs are single spaced other paragraphs may be doublespaced.
5. Our up to date textbook is easy to understand.
6. The rough draft copy of the book Writing Business Letters is almost complete.
7. The height of Ellens chair needs adjusting.
8. The companys mailroom is on the third floor and the presidents office is on the fifth floor.
9. Alex agreed to proofread the following two chapters Interoffice Memorandums and Two Page Reports.
10. A full sheet of 8 1/2" by 11" paper has 66 lines a half sheet has 33 lines.

BUSINESS COMMUNICATIONS/ACTIVITY EIGHT

DIRECTIONS: Write one sentence using each part of speech listed below. Circle the part of speech in the sentence you write.

1. Noun: ______________________________

2. Pronoun: ______________________________

3. Verb: ______________________________

4. Adjective: ______________________________

5. Adverb: ______________________________

6. Conjunction: ______________________________

7. Preposition: ______________________________

8. Interjection: ______________________________

DIRECTIONS: In the following two sentences, underline nouns once and verbs twice.

9. You should always keep your reader in mind when you write a letter.

10. The author of a letter should choose clear, concise words.

COMPOSING AND FORMATTING A LETTER OF REQUEST

In a letter of request, the writer usually asks the reader to act in a specific way or to make a contribution. Or, the writer provides the reader with a service or information. It is important to state your request in the first paragraph so that the reader will know immediately what the letter is about. A letter of request usually contains the following three or four paragraphs:

Paragraph 1 states the request.

Paragraph 2 explains the request.

Paragraph 2 or 3 motivates the reader to act.

Paragraph 3 or 4 courteously closes the letter.

DIRECTIONS: Using the information below, compose, format, and key a letter to illustrate a letter of request. Type the letter on plain paper, using any acceptable format. Proofread your work, and make any necessary corrections to produce a mailable document.

As program chairman of the Office Education Association of Reagan High School, you are responsible for obtaining a guest speaker for the October 20 dinner meeting. Members of the club have suggested Dr. Sharon O'Neill, and you have heard that she is an excellent speaker on the subject of automated office systems.

Write to Dr. O'Neill at the University of Houston, Department of Technology, 1500 Maverick Drive, Houston, Texas 75123. Ask her to speak to your club for about thirty minutes on October 20. Invite her to be your guest for dinner at 7 p.m. in the dining room that adjoins the cafeteria. The program will start at approximately 8 p.m., and the meeting should adjourn by 9 p.m. Your club is not able to pay speaking fees, but will pay travel expenses for her.

COMPOSING AND FORMATTING A LETTER OF POSITIVE RESPONSE

The positive response letter can usually be written easily and quickly because the writer gives an answer that is welcomed by the reader. It also provides an opportunity to build goodwill for your organization. The positive response letter usually contains the following three paragraphs:

Paragraph 1 restates the request and answers "yes".

Paragraph 2 gives any pertinent information.

Paragraph 3 closes with an expression of goodwill.

DIRECTIONS: Using the information below, write a letter of positive response. Type the letter on plain paper, using any acceptable format. Proofread your work and make any necessary corrections to produce a mailable document.

Dr. O'Neill is a strong supporter of the Office Education Association and is happy to speak at the meeting on October 20. As Dr. O'Neill, write a letter accepting the speaking engagement. You will need a slide projector and screen for your presentation, which is entitled"Office Information Systems of the Future". You will be able to join the club for dinner before the meeting. Address the letter to (your name), Office Education Association, Reagan High School, 7204 Berkman Drive, Austin, Texas 78752.

COMPOSING AND FORMATTING A LETTER OF NEGATIVE RESPONSE

Negative response letters are the most difficult to write because the writer must refuse to grant the request, but still maintain the goodwill of the reader. It is usually better to explain the refusal before actually saying "no". If possible, a letter of negative response should offer an alternate solution to the request. A skilled writer can give a negative response and still leave the reader with a favorable impression. The negative response letter usually contains the following three paragraphs:

Paragraph 1 expresses goodwill.

Paragraph 2 says "no" and explains the refusal.

Paragraph 3 closes with goodwill.

DIRECTIONS: Using the information below, write a letter illustrating a letter of negative response. Type the letter on plain paper, using any acceptable format. Proofread your work, and make any necessary corrections to produce a mailable document.

As Dr. O'Neill, you are a strong supporter of the Office Education Association. However, you will be out of town attending a convention and will be unable to speak on October 20. You have been working closely with your colleague, Dr. Betty Peace, and you recommend her as a speaker for the group. Dr. Peace has been doing research on office information management techniques, and she has a dynamic and energetic personality. Or, perhaps you could speak to the group at a later date. Write a letter declining the invitation to speak. Suggest Dr. Betty Peace as an alternate. Address the letter to the same address as the letter of positive response.

BUSINESS COMMUNICATIONS/ACTIVITY TWELVE

COMPOSING AND FORMATTING A LETTER OF GOODWILL

The goodwill letter is one of the most frequently used business letters, and it usually expresses thanks or offers congratulations. The goodwill letter leaves the reader with a positive feeling. Letters of goodwill usually contain three paragraphs, each containing the following:

Paragraph 1 promotes goodwill.

Paragraph 2 expands and explains.

Paragraph 3 reiterates goodwill.

DIRECTIONS: Using the information below, write a letter of goodwill. Type the letter on plain paper, using any acceptable format. Proofread your work, and make any necessary corrections to produce a mailable document.

As the secretary of the Office Education Association, write a letter to Dr. O'Neill thanking her for speaking to your group. Her talk was very interesting, and the members of the club were challenged by her innovative ideas. Many expressed their desire to have Dr. O'Neill speak to them again next year. Use the same address as the letter of request.

COMPOSING AND FORMATTING A WELL-WRITTEN BUSINESS LETTER

A well-written business letter demonstrates the following writing techniques:

a. The message is concisely written.

b. Transitions occur where necessary.

c The "you" attitude is obvious.

d The message is written using positive language.

e. Sentence structure is varied.

f. Paragraphs are an appropriate length.

g. The writer has promoted goodwill.

h. The letter is mechanically correct and accurate.

DIRECTIONS: Using the information given in the situation below, compose and format a business letter using the writing techniques listed above. Type the letter on plain paper, using any acceptable format. Proofread your work, and make any necessary corrections to produce a mailable document.

You are an administrative assistant to Dr. Bill Barnes, director of the Occupational Curriculum Laboratory. Dr. Barnes is out of the office this week. In today's mail, he received a letter from a teacher requesting information for use in a graduate class report. The teacher would like data showing the projected sales for the year broken down by each project, and the projected dollar return from the actual contract amount for each project.

Since you know that Dr. Barnes considers this confidential information, and since his policy is to respond to requests for information within 24 hours, you must send the teacher a letter denying his request for information. The teacher is John Weaver. He had requested that the information be sent to him at 1020 East Olive Drive, Fort Worth, Texas 76134.

BUSINESS COMMUNICATIONS/UNIT TEST

PART 1

DIRECTIONS: Place the correct answer in the blank.

_____ 1. Your last name and your first name (is, are) required on the application.

_____ 2. Neither Sam nor Sara (is, are) planning to attend the special session.

_____ 3. The band (was, were) playing a jazz number.

_____ 4. Vernon and the boys (has, have) been fishing all weekend.

_____ 5. Five hundred dollars (is, are) a large investment for Hank.

_____ 6. There are (6, six) ways to solve the problems we are having with this budget.

_____ 7. More than (3/4, three-quarters) of the class wanted summer jobs.

_____ 8. To completely furnish the office, we need 12 staplers, (3, three) trash cans, and 14 chairs.

_____ 9. Please order (fifty, 50) 5 1/4 inch disks for our computer.

_____ 10. (Col., Colonel) Andrew Harding will be our guest speaker next Thursday.

PART 2

DIRECTIONS: Insert the necessary punctuation in the following sentences.

1. After studying the report we are in favor of the new changes but we will wait to hear from the other departments.
2. We are glad to have you as a new employee Ms Benson.
3. The office Christmas party will be held on Friday December 14 in the Regency Hotels ballroom.
4. Katie is absent today she has the flu.
5. Please order the following supplies pencils paper clips erasers and marking pens.
6. These packages are being sent to Dallas Texas Birmingham Alabama Tampa Florida and San Diego California.
7. Amy decided to improve her typing skills so she bought a self paced computer program called Typing Is Easy.
8. If you are the last person to leave the office please do the following 1 unplug the coffee pot 2 turn off the lights and 3 lock the door.

PART 2 (continued)

9. Be sure to read Chapter 6 Conquering Spreadsheets.

10. The up to date report is most impressive.

PART 3

DIRECTIONS: In the following sentences, circle any letter(s) which should be capitalized. Insert any necessary punctuation.

1. president garner said he planned to campaign in the west next fall.

2. arthur said that senator bradley from arizona plans to join him.

3. both president garner and senator bradley served together in the korean war.

4. james varney president of xerox corporation is willing to make a financial contribution to the campaign.

5. mildred starling phd will be the campaign manager.

PART 4

DIRECTIONS: Properly spell the root word with its added suffix. Add or subtract letters as necessary.

1. take + en = ______________________

2. plan + ed = ______________________

3. submit + ed = ____________________

4. refer + ence = ____________________

5. ship + ment = ____________________

PART 5

DIRECTIONS: If the word is spelled correctly, write TRUE in the blank. If the word is misspelled, spell the word correctly in the blank.

1. nieghbor ________________________

2. weight __________________________

PART 5 (continued)

3. decieve ______________________________

4. achieve ______________________________

5. preview ______________________________

PART 6

DIRECTIONS: If the possessive in the sentence is correct, write TRUE in the blank. If the possessive is incorrect, place the correct possessive in the blank.

__________ 1. I was very impressed with April's report.

__________ 2. The two consultants' recommendations will be presented at the next meeting.

__________ 3. Carl and Helen painted the equipment on the childrens' playground.

__________ 4. Please take the car to Alberto Lopezs' garage.

__________ 5. Freds' remark surprised everyone.

PART 7

DIRECTIONS: List and describe the four basic parts of a formal report.

PART 8

DIRECTIONS: Explain how a speaker receives feedback from his/her audience.

PART 9

DIRECTIONS: Use the following information to compose a letter of request.

You are the secretary of your school photography club at Bismark High School. Your club is planning a spring-break trip to Aspen, Colorado, to ski and take pictures. Write to the Snowtop Lodge requesting the cost of six double rooms for five days (March 3 through March 7) and the availability of the rooms. Find out if a deposit is required, the amount of the deposit, and the date the deposit is due. You also would like any information the hotel might have on the local skiing facilities.
Address the letter to Snowtop Lodge, 9999 Frosty Way, Aspen, CO 53662.

BUSINESS COMMUNICATIONS/ANSWER SHEET

ACTIVITY ONE

1. was
2. is
3. is
4. was
5. was
6. was
7. is
8. has
9. is
10. has

ACTIVITY TWO

1. ACTIVE
2. ACTIVE
3. Ann Garza wrote the report.
4. Mark completed a worksheet....
5. Al Lewis informed the staff members....

ACTIVITY THREE

1. CORRECT
2. The president of the firm is Howard P. Jacobson, Jr.
3. Mr. Robert T. Simpson will be our guest speaker.
4. Thirty-four....
5. CORRECT
6. CORRECT
7. On September 7, ...
8. Please print 200 ten-page....
9. CORRECT
10. CORRECT

ACTIVITY FOUR

1. CORRECT
2. CORRECT

3. businessmen's
4. CORRECT
5. CORRECT
6. families
7. CORRECT
8. CORRECT
9. CORRECT
10. Sam's

ACTIVITY FIVE

1. studies
2. mottoes
3. years
4. attorneys
5. gypsies
6. runner
7. wished
8. recurrence
9. likable
10. improvement
11. CIRCLE
12. CIRCLE
13. CIRCLE
14. CORRECT
15. CORRECT
16. CORRECT
17. CORRECT
18. CORRECT
19. CIRCLE
20. CORRECT

ACTIVITY SIX

1. In the fall I think I will take *English*, history, and typewriting.
2. Our marketing director, *Robert Thompson*, will be a guest speaker at *Marshall High School*.
3. Before coming to *San Antonio*, *President Reagan* stopped in *Dallas*.
4. *President Reagan* gave an interesting, lively speech on the *Middle East*; however, he did seem tired from the traveling.
5. Next month *Miriam Fitch*, president of *Fitch Industries*, will be coming to *Kennedy High School* to speak on job opportunities.
6. You will need the following supplies for the next math exam: pencil, paper, and a calculator.
7. Our new class officers are *Mark Morley*, president; *Karen Wilson*, vice president; and *Andrew Warner*, secretary.
8. Please open the window, *Rhonda*.
9. On *Wednesday*, *March* 12, our *Spanish* club will take a trip to *Mexico City*.
10. I can't remember who said, "to be or not to be, that is the question."

ACTIVITY SEVEN

1. One horizontal inch equals 12 elite spaces; one horizontal inch also equals 10 pica spaces.
2. Claudia has lived in Dallas, Texas; New Orleans, Louisiana; and Tulsa, Oklahoma.
3. The steps for typing in all capital letters are as follows: depress the shift lock, type the words, release the lock by touching the right shift key.
4. Although some paragraphs are single spaced, other paragraphs may be double-spaced.
5. Our *up-to-date* textbook is easy to understand.
6. The *rough-draft* copy of the book Writing Business Letters is almost complete.
7. The height of *Ellen's* chair needs adjusting.
8. The *company's* mailroom is on the third floor and the *president's* office is on the fifth floor.
9. Alex agreed to proofread the following two chapters: "Interoffice Memorandums" and *"Two-Page* Reports."
10. A full sheet of 8 1/2" by 11" paper has 66 lines; a half sheet has 33 lines.

ACTIVITY EIGHT

1.- 8. Evaluated to the satisfaction of the instructor.

9. You should always keep your reader in mind when you write a letter.

10. The author of a letter should choose clear, concise words.

ACTIVITIES NINE through THIRTEEN -- Evaluated to the satisfaction of the instructor.

UNIT TEST

PART 1

1. are
2. is
3. was
4. have
5. is
6. six
7. three-quarters
8. 3
9. fifty
10. Col.

PART 2

1. After studying the report, we are in favor of the new changes; but we will wait to hear from the other departments.

2. We are glad to have you as a new *employee*, *Ms*. Benson.

3. The office Christmas party will be held on *Friday*, December *14*, in the Regency *Hotel's* ballroom.

4. Katie is absent *today*; she has the flu.

5. Please order the following *supplies*: *pencils*, paper *clips*, *erasers*, and marking pens.

6. These packages are being sent to *Dallas*, *Texas*; *Birmingham*, *Alabama*; *Tampa*, *Florida*; and San *Diego*, California.

7. Amy decided to improve her typing *skills*, so she bought a *self-paced* computer program called "*Typing Is Easy.*"

8. If you are the last person to leave the *office*, please do the *following*: (*1*) unplug the coffee *pot*, (*2*) turn off the *lights*, and (*3*) lock the door.
9. Be sure to read the Chapter *6*, "Conquering Spreadsheets."
10. The *up-to-date* report is most impressive.

PART 3

1. *President Garner* said he planned to campaign in the *West* next fall.
2. *Arthur* said that *Senator Bradley* from *Arizona* plans to join him.
3. *Both President Garner* and *Senator Bradley* served together in the *Korean War*.
4. *James Varney*, president of *Xerox Corporation*, is willing to make a financial contribution to the campaign.
5. *Mildred Starling*, *PhD*, will be the campaign manager.

PART 4

1. taken
2. planned
3. submitted
4. reference
5. shipment

PART 5

1. neighbor
2. TRUE
3. deceive
4. TRUE
5. TRUE

PART 6

1. TRUE
2. TRUE
3. children's
4. Lopez's
5. Fred's

PART 7

1. Title page: The title page presents the full title of a report, any subtitle, author's name and date.
2. Table of contents: The table of contents is a list of all chapters, and each chapter's beginning page number.
3. Body: The body of a report contains an introduction, the text, and a conclusion. It also can include side headings and paragraph headings. Footnotes, which are secondary references, may be placed at the bottom of each page. The body presents facts and information and discusses the objective or problem.
4. Bibliography: The bibliography is a list of sources of material used in preparing the report. The bibliography follows the body of the report.

PART 8

A speaker receives feedback through listening and observing non-verbal communication. A speaker should listen carefully, respond to questions, and ask for clarification if needed. Eye contact, facial expressions and body posture are all forms of non-verbal communication.

PART 9

Evaluated to the satisfaction of the instructor.

TEN COMMANDMENTS FOR GOOD LISTENING

1. **Stop Talking** -- You cannot listen if you are talking. Polonius (Hamlet): "Give every man thine ear, but few thy vice".

2. **Put the Talker at Ease** -- Help him/her feel that he/she is free to talk. This is often called a "permissive environment".

3. **Show Them That You Want to Listen** -- Look and act interested. Do not read your mail while they talk. Listen to understand rather than to reply.

4. **Remove Distractions** -- Don't doodle, tap, or shuffle papers. Will it be quieter if you shut the door?

5. **Empathize with the Speaker** -- Try to put yourself in his/her place so that you can see his/her point of view.

6. **Be Patient** -- Allow plenty of time. Do not interrupt him/her. Don't start for the door or walk away.

7. **Hold Your Temper** -- An angry man gets the wrong meaning from words.

8. **Go Easy on Argument and Criticism** -- This puts him/her on the defensive. He/she may "clam up" or get angry. Don't argue. Even if you win, you lose.

9. **Ask Questions** -- This encourages him/her, and shows that you are listening. It helps to develop points further.

10. **Stop Talking** -- This is the first and last commandment because all other commandments depend on it. You simply can't do a good job of listening while you are talking.

NATURE GAVE MAN TWO EARS BUT ONLY ONE TONGUE, WHICH IS A GENTLE HINT THAT HE SHOULD LISTEN MORE THAN HE TALKS.

Keith Davis, Human Relations in Business, McGraw-Hill Book Company, Inc. 1957, page 241.

HOW WE MAKE COMMUNICATION DIFFICULT

LISTED BELOW ARE THIRTEEN WAYS WE MAKE COMMUNICATION DIFFICULT

1. Use of vocabulary beyond level of comprehension.
2. Speaking in technical terms without explanation.
3. Talking too fast or too slow.
4. Speaking too loudly or too softly.
5. Saying too little or too much.
6. Straying from the subject.
7. Not paying attention to what is said.
8. Thinking about what we want to say rather than concentrating on what the other person is saying.
9. Failing to ask questions for clarification.
10. Monopolizing the conversation.
11. Staying in our time frame of reference and ignoring that of others.
12. Becoming hostile if others disagree.
13. Becoming afraid if ideas are introduced which threaten our self-esteem or value system.

IMPROVING ORAL COMMUNICATIONS

LISTED BELOW ARE TEN EXCELLENT WAYS OF IMPROVING YOUR ORAL COMMUNICATION

1. Go back to the original source -- check facts -- make sure information is correct.
2. Take into consideration that information received verbally or orally is likely to be distorted -- suspect distortion.
3. Make allowances for exaggeration.
4. Make sure information passed on to others is accurate.
5. If a decision is involved, check facts before making up your mind.
6. Watch out for tendencies to stereotype people.
7. Remember, we favor "our kind" of people.
8. Remember, we tend to look down on some types of people, consciously or unconsciously.
9. Remember, what we think of a person will influence our interpretation of what they say.
10. Be suspicious of what "Everybody knows is true".

ALWAYS REMEMBER -- PEOPLE USE WORDS TO EXPRESS FEELINGS AND EMOTIONS AS WELL AS FACTS AND BELIEFS.

IMPROVE YOUR COMMUNICATIONS

HERE ARE TWELVE WAYS YOU CAN IMPROVE YOUR COMMUNICATIONS SKILLS

1. Use words familiar to listeners; define words suspected of not being in their vocabulary.
2. Avoid use of technical terms unless explained or with people you know understand what you are talking about.
3. Avoid speaking too rapidly or trying to cover too much material.
4. Avoid speaking too slowly.
5. Adjust volume to need.
6. Be brief, but cover all essential points.
7. Give the other person a chance to speak (initiate or reply to your comments or questions).
8. Ask questions for clarification.
9. Realize that an intelligent reply is based on comprehension.
10. Practice the "Golden Rule" (Do unto others as you would have them do unto you).
11. Switch attention from yourself to the other person or persons.
12. When your feelings interfere with communications, analyze why you feel as you do.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(A)

The student will be able to demonatrate proficiency in business English, spelling, and proofreading.

OBJECTIVE:	Demonstrate competency in proofreading a document using proofreader's marks and produce the document in mailable form.	MASTERY	NON MASTERY
1.	Identify proofreader's marks		
2.	Write proofreader's marks.		
3.	Identify types of errors.		
4.	Identify efficient proofreading skills.		
5.	Proofread a letter.		
6.	Use proofreader's marks to edit a letter.		
7.	keyboard the letter in mailable form.		
8.	Proofread a report.		
9.	Use proofreader's marks to edit a report.		
10.	Keyboard the report in mailable form.		

STUDENT NAME ______________________________

PROOFREADING INFORMATION/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(A)** Demonstrate proficiency in business English, spelling, and proofreading.

LEARNING OBJECTIVE: Demonstrate competency in proofreading a document using proofreader's marks and produce the document in mailable form.

GENERALIZATION: Knowledge of proofreading skills can greatly increase efficiency on the job.

CONTENT OUTLINE

I. IMPORTANCE OF PROOFREADING

II. PROOFREADER'S MARKS

III. PROOFREADING TECHNIQUES

- A. Evaluating
  1. Overall appearance
  2. Mechanics and grammar
  3. Content
- B. Reading

IV. TYPES OF COMMMON ERRORS

- A. Transposition
- B. Substitution
- C. Omission
  1. Addition

LEARNING EXPERIENCES

1. Discuss the importance of accurate proofreading.
2. Discuss how to proofread and study proofreader's marks.
3. Using a worksheet, identify proofreader's marks.
4. Using a worksheet, identify incorrectly typed numbers.
5. Using a worksheet, identify incorrectly spelled names.
6. Applying proofreading techniques, proofread the straight copy of two letters and an information sheet.
7. Proofread a statistical report and retype the report in a mailable format.

EVALUATION CRITERIA

1. Complete a test on the following:
   - a. Identify proofreader's marks
   - b. Identify types of errors
   - c. Identify characteristics of a good proofreader
2. Using proofreader's marks, accurately proofread a letter and a statistical report. Retype the letter and report in mailable form.

PROOFREADING INFORMATION/RESOURCES

TEXTBOOKS

DEVELOPING PROOFREADING SKILL
Gregg/McGraw-Hill

SRA REFERENCE MANUAL FOR OFFICE PERSONNEL
Western Michigan University
Science Research Associates, Inc.

APPLIED SECRETARIAL PROCEDURES
Gregg/McGraw-Hill

OFFICE PROCEDURES
MPC Educational Publishers

THE REFERENCE GUIDE
Houghton-Mifflin Company

SECRETARIAL PROCEDURES AND ADMINISTRATION
South-Western Publishing Co.

THE WP BOOK, A REFERENCE MANUAL
John Wiley and Sons, Inc.

TEXT/WORKBOOKS

PROOFREADING PRECISION
South-Western Publishing Company

DEVELOPING PROOFREADING SKILL
Gregg/McGraw-Hill

ENGLISH STYLE SKILL-BUILDERS
Gregg/McGraw-Hill

PROOFREADING
Glencoe Publishing Co.

TECHNIQUES FOR PROOFREADING AND MAKING CORRECTIONS
MPC Educational Publishers

PROOFREADING INFORMATION/UNIT OVERVIEW

I. IMPORTANCE OF PROOFREADING

A. *Proofreading* is the examination of printed text to mark errors which need correction.

B. In today's *automated office*, word processing has led to the production of more documents, which increases the chances for mistakes.

II. PROOFREADER'S MARKS

A. Standard *proofreader's marks* indicate needed corrections. Refer to an office reference manual for a list of standard proofreader's marks.

III. PROOFREADING TECHNIQUES

A. *Evaluating Overall Appearance*

1. Begin by looking at the overall appearance of a document for neatness as well as correct placement and sequence of parts.
2. Proofread text while paper is still in the typewriter. If you are using a word processor, proofread and make corrections before printing the document.

B. *Evaluating Mechanics and Grammar*

1. Check for correct spelling; use a dictionary. Pay attention to the spelling of names and locations.
2. Locate typographical errors.
3. Look for correct word division. Use a word division manual.
4. Check for accurate punctuation and capitalization.
5. Evaluate the use of grammar. Use a reference manual to help you determine correct subject-verb agreement, pronoun and antecedent agreement, incomplete sentences, and correct word choice.

C. *Evaluating Content*

1. Read the document for clarity of meaning.
2. Check to see if all necessary information is included.
3. Carefully check the accuracy of numbers and technical material.

D. *Reading Hints*

1. Read much slower than your normal reading rate.

2. When reading from a screen, read the document once and then scroll backwards reading each line backwards. Check for details.

3. The most common places to find errors are in headings, beginnings or endings of lines, bottom of the page, frequent long words, proper nouns, and numbers.

4. Proofread for one kind of error at a time: mechanical, format, content.

5. Proofread difficult material and names letter by letter. Compare to your source document.

6. Read aloud or move lips to form words to improve concentration.

IV. TYPES OF COMMON ERRORS

A. *Transposition*

1. Check for words that have been transposed.

2. Search for letters within a word that have been transposed.

3. Double check for transposition of numbers.

B. *Substitution*

1. Look for the substitution of one small word for another. Reading for meaning helps here.

C. *Omission*

1. Check for the omission of letters, words, and lines.

2. Pay attention to the omission of one of a pair of doubled letters.

V. HELPFUL HINTS

A. Use your finger or a pen as a guide when reading.

B. Read with another person. One person reads from the original draft, while the other checks the final copy.

C. Use proofreader's marks and make notes in the margins.

PROOFREADING INFORMATION/ACTIVITY ONE

DIRECTIONS: Fill in the blank with the correct proofreader's mark.

PROOFREADER'S MARKS

__________ 1. Insert

__________ 2. Transpose

__________ 3. Delete

__________ 4. Do not delete

__________ 5. Capitalize

__________ 6. Lower case

__________ 7. Insert period

__________ 8. Bring together

__________ 9. Leave a space

__________10. Move to the left

__________11. Move to the right

__________12. Spell out

__________13. No paragraph

__________14. Center on page

__________15. Single space

__________16. New paragraph

__________17. Double space

PROOFREADING INFORMATION/ACTIVITY TWO

DIRECTIONS: This exercise will provide practice in proofreading, editing, and revising business letters. Proofread the following letters, edit them using proofreader's marks, and type the corrected letters.

May 20, 1987

Mr John McBride
2225 East Randolf Road
Houston TX75228

Dear Mr. McBride,

The monthly meeting of the Managers Association of Housdton will be held on Tues., June 10 in the Blue Room of the university Inn, 2167 Main Street, Houston, Texas. Dinner will be at 7 p.m., and tickets are $6 per person.
Richard Yarnell will be our guest speaker for the evening. His topic will be the merging of word and data processing.
Please let us know by June 5 wehther you will be able to attend.

Sincerely yours,

Don Leggett
President
tb

PROOFREADING INFORMATION/ACTIVITY TWO (Continued)

May 25,1987

Mr. Robert Smith, Pres.
Internation Word processing
  Association
2427 5th Street
Austin, TX65215

Dear Mr. Smith:

Thank you for accepting our invitaion to speak at the summer inservice workship on Thursday, August 6. As I mentioned to you,the meeting will be held in Room 206 of the Student Union Bldg. at North Texas State Univ., Denton, Texas.
Your indicated that the title of your speach is "Integrating word Processing into the Classroom. If you decide to change the title, please let me know by July 10 so that I can correct the title in the program. Your room reservations have been make at the Inn of the South for August 6 and 7. I look forward to seeing you at the m-eting.

Sincerely yours,
Betty Mendoza
Organizer

tb

PROOFREADING INFORMATION/ACTIVITY THREE

DIRECTIONS: This exercise will provide practice in proofreading figures. Just as employees expect paychecks to be correct, so do employers expect typed reports to be correct.

1. Proofread the statistical report at the bottom of this page by checking with the correct report on the next page. Use proofreader's marks.
2. Type the report in good form.
3. Turn in both copies for evaluation by the instructor.

PROBLEM

STUDENTS PER GRADE LEVEL
PANORAMA HIGH SCHOOL
1985-1990

	9th Grade	10th Grade	11th Grade	12th Grade
1985	168	192	39	82
1986	129	168	130	108
1987	203	129	711	130
1987	489	312	602	202
1990	472	389	313	312
1988	399	396	298	267

CORRECT FORM

STUDENTS PER GRADE LEVEL
PANORAMA HIGH SCHOOL
1985-1990

	9th Grade	10th Grade	11th Grade	12th Grade
1985	168	129	93	82
1986	192	138	120	106
1987	302	126	117	103
1988	489	312	206	212
1989	472	389	313	321
1990	399	369	289	276

PROOFREADING INFORMATION/ACTIVITY FOUR

DIRECTIONS: This exercise will provide practice in locating misspelled names. Many names that sound alike are not spelled alike. The names in Column A are spelled correctly. Place a check mark in the blank if the spelling of the name in Column B does not match the correct spelling in Column A.

	Column A	Column B	
1.	Frances Abington	Frances Abington	____
2.	Konrad Adenauer	Kanrod Adenauer	____
3.	Alexander Agassiz	Alexander Agaasiz	____
4.	Mikhail Bakunin	Mihhail Bakunin	____
5.	John Carteret	John Carteret	____
6.	Camille Chautemps	Camille Chautemps	____
7.	Thomas DeQuincey	Thomas Dequincey	____
8.	Ilya Ehrenburg	Ilya Ehrenburg	____
9.	Nathalie Goncharova	Nathalie Conchorova	____
10.	Michael Hohenzollern	Michael Hohezollern	____
11.	Fabian Lagerkvist	Fabian Lagervist	____
12.	Ignace Paderewski	Ignace Paderewski	____
13.	Arthur Rubinstein	Arthur Rubenstein	____
14.	Carl Spaatz	Carl Spaatz	____
15.	Alfred Stieglitz	Alfred Steiglitz	____
16.	Jan Sweelinck	Jan Sweelinch	____
17.	Joseph Szigeti	Josesph Szigeti	____
18.	Kakueri Tanaka	Kakueri Tankoka	____

PROOFREADING INFORMATION/ACTIVITY FIVE

DIRECTIONS: This exercise will provide practice in locating typographic errors in a series of numbers. Developing accurate proofreading skills will help to establish employer confidence in your ability to proofread and correct errors.

All numbers in the first column are correct; however, some of those in the second column contain typographic errors. Place a check mark by the number of the ones in the second column that are incorrect.

1.	9689-6690-884626	9689-6960-84626
2.	1131-1148-75808	1113-1418-78508
3.	8325-9096-36020	8325-9096-36020
4.	6457-5907-30414	6475-5907-34014
5.	1830-0961-38837	1830-0961-38837
6.	9117-0044-68869	9117-0044-00889
7.	7422-4762-60705	7422-4672-0705
8.	6297-2269-54464	6297-2269-56444
9.	4326-3222-96066	4326-3222-96066
10.	7909-2263-97202	7909-2236-97202
11.	8609-1102-79206	8609-1102-70206
12.	9881-3699-75269	9881-3699-75269
13.	5826-4982-88921	5826-4892-88921
14.	2550-8203-58209	2550-8302-58209

PROOFREADING INFORMATION/UNIT TEST

DIRECTIONS: Fill in the blank with the correct proofreader's mark.

_____ 1. delete
_____ 2. new paragraph
_____ 3. insert
_____ 4. move left
_____ 5. let it stand
_____ 6. capitalize
_____ 7. close up
_____ 8. move right
_____ 9. transpose
_____ 10. lower case

DIRECTIONS: Use proofreader's marks to indicate any corrections that need to be made. After marking corrections, retype the letter in a mailable format using modified block style with indented paragraphs.

November 6, 1988

Mis Jennifer Morehouse
1301 Avnue Q
Minneapolis, MN 55431
Dear Jennifer

Congratulations! You have been excepted as a member of the Collins High School Dance Team.

As a new member you will need ot fill our the enclosed form and bring it with you to the first meeting on monday, August 5..

At our first meeting, You will be measured for your uniform and given a practice schedule. All practices are mandatory.

I am looking forwardto working with you. See you on the fifth in the girls' gymnasium at 4;00 p.m.

Sincerly,

Mrs. Joan Bower
Dance Team Sponsor

PROOFREADING INFORMATION/ANSWER SHEET

ACTIVITIES WILL BE EVALUATED TO THE SATISFACTION OF THE INSTRUCTOR.

UNIT TEST

DIRECTIONS: Fill in the blank with the correct proofreader's mark.

ℓ 1. delete

¶ 2. new paragraph

∧ 3. insert

⊏ 4. move left

STET 5. let it stand

≡ 6. capitalize

⁀‿ 7. close up

⊐ 8. move right

∾ 9. transpose

lc 10. lower case

DIRECTIONS: Use proofreader's marks to indicate any corrections that need to be made. After marking corrections, retype the letter in a mailable format using modified block style with indented paragraphs.

November 6, 1988

Mis**s** Jennifer Morehouse
1301 Av**e**nue Q
Minneapolis, MN 55431

Dear Jennifer**:**

Congratulations! _You have been **ac**cepted as a member of the Collins High School Dance Team.

As a new member you will need **to** fill ou**t** the enclosed form and bring_it with you to the first meeting on **M**onday, August 5.

At our first meeting, **y**ou will be measured for your uniform and given a practice schedule. All practices are mandatory.

I am looking forward_to working with you. See you on the fifth in the girls' gymnasium at 4**:**00 p.m.

Sincer**e**ly,

Mrs. Joan Bower
Dance Team Sponsor

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(B)

The student will be provided opportunities to demonstrate concepts and skills related to effective communication and production of business documents.

OBJECTIVE:	Identify and apply correct format for business correspondence and documents.	MASTERY	NON MASTERY
1.	Identify and arrange in acceptable format the standard basic parts of a letter.	______	______
2.	Describe and apply the three formatting styles of business letters.	______	______
3.	Keyboard and produce in correct format a modified block, two-page letter.	______	______
4.	Keyboard and produce a correctly formatted large envelope.	______	______
5.	Identify and demonstrate the requirements of a mailable business document.	______	______
6.	Keyboard and produce an interoffice memorandum in correct format.	______	______
7.	Describe the purpose and preparation of form letters.	______	______
8.	Keyboard a correctly formatted table.	______	______
9.	Keyboard correctly an unbound report.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Identify and arrange in acceptable format the standard basic parts of a letter.

GENERALIZATION: Businesses choose letter styles by arranging basic letter parts.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. STANDARD BASIC PARTS OF A BUSINESS LETTER A. Dateline B. Inside address C. Salutation D. Body of letter E. Complimentary close F. Signature line G. Reference initials H. Enclosure notations	1. Look at examples using handouts or overheads depicting the proper placement and names of the basic parts of a letter. 2. Discuss various options of placement of basic parts and margins to achieve a pleasing appearance. 3. Using a worksheet, identify letter parts and arrange the parts in proper sequence.	1. Identify basic letter parts and placement of parts. 2. Using knowledge of vertical and horizontal placement, discuss how to vary the placement of letter parts on letterhead stationery to achieve a well-balanced appearance.
II. FLEXIBILITY OF FORMAT A. Vertical placement B. Horizontal placement		

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Describe and apply the three formatting styles of business letters.

GENERALIZATION: Businesses choose letter styles from three basic formats.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. STYLES OF BUSINESS LETTERS A Block B. Modified block C. AMS Simplified	1. After viewing examples of modified block, block and simplified styles of letters, students will identify, according to style, letters from the local business community.	1. Identify block, modified block, and simplified letter styles. 2. Explain the similarities and differences among the three styles.
II. TWO-PAGE LETTERS	2. View and discuss the format of the second page of a letter.	3. Keyboard and produce in correct format a modified block, two-page letter.
	3. Using a worksheet, make the necessary adjustments to create the three styles of letters: modified block, block, and simplified.	4. Keyboard and produce in correct format a letter in block format.
	4. Retype the letter from the worksheet producing three malable copies: Copy 1: Block style Copy 2: Modified blockstyle Copy 3: AMS simplified style	

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(f1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Identify and correctly format the parts of an envelope.

GENERALIZATION: To facilitate the mailing process, a standardized format for typing envelopes is necessary.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. PARTS OF ENVELOPES A Return address B. Address C. Addressee notations D. Mailing notations	1. Using a worksheet, correctly identify the parts of an envelope. 2. Bring envelopes from home and compare and discuss their formats. 3. Type a small envelope with the following two notations: personal and registered.	1. Keyboard and produce a correctly formatted large envelope with confidential and registered notations.
II. PLACEMENT OF PARTS A. Large envelopes B. Small envelopes	4. Type a large envelope with the following notation: special delivery.	

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Identify the requirements of a mailable business document.

GENERALIZATION: Business letters represent the company that sends them; therefore, in order to create a professional and positive image, "mailable" letters are a must.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVAULATION CRITERIA
I. MAILABLE BUSINESS DOCUMENTS	1. Using collected samples, identify mailable and unmailable letters.	1. List the requirements of a mailable letter.
A. Neatly and accurately typed B. Correct spelling C. Correct punctuation D. Proper capitalization E. Acceptable word division F. Attractive placement of letter on the page.	2. As a group, discuss, then make a list on the board of the qualities of a mailable document. Explain why mailable letters create a positive image for the reader.	2. On the example you are given, use proofreader's marks to indicate errors and then retype the letter in mailable form.
	3. On a worksheet, identify the negative aspects of a poorly formatted letter. At the bottom of the worksheet, explain how these errors should be corrected.	
	4. On a sample letter, use proofreader's marks to designate any errors and then retype the letter in mailable form.	

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Keyboard and produce an interoffice memorandum in correct format.

GENERALIZATION: Memorandums are a major method of interoffice communication.

CONTENT OUTLINE

I. BASIC PARTS OF A MEMORANDUM
   - A. Memo heading (To, From, Date, Subject)
   - B. Body
   - C. Reference initials

II. FORMAT
   - A. Vertical placement
   - B. Horizontal placement

LEARNING EXPERIENCE

1. Identify the parts of a memorandum and their correct order.
2. As a group or individually, read sample memorandums from the local business community and critique the formats of the memorandums.
3. Using a worksheet, indicate the proper placement of memorandum parts as well as identifying correct horizontal and vertical placement on the page.
4. Type the sample memorandum in an acceptable, mailable format.
5. In correct format, type a memorandum which has been written in longhand.

EVALUATION CRITERIA

1. Using an acceptable format, keyboard and produce a memorandum from a rough draft.

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE:	**EE 75.87(c)(1)(b)** Identify and apply correct format for business correspondence and documents.
LEARNING OBJECTIVE:	Describe the usefulness of form letters.
GENERALIZATION:	Businesses often use form letters for routine or large-volume correspondence.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. FORM LETTERS A. Purpose B. Adaptability C. Use in word processing	1. Gather samples of form letters from direct mail advertising and evaluate the impression each gives. 2. Discuss why form letters are well suited for use in information processing.	1. On a sheet of paper, defend the use of form letters.

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Identify the parts of a table and type a correctly formatted table which contains a heading, a subheading, and both short and long column headings.

GENERALIZATION: Before formatting a table, an understanding of the parts of a table is necessary. Producing tables is an integral part of producing documents in an office.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVAULATION CRITERIA
I. PARTS OF A TABLE	1. Using an overhead transparency, observe and discuss the parts of a table.	1. Label the parts of a table and indicate their correct arrangement.
A. Main heading B. Subheading C. Body D. Column E. Column heading	2. Using a worksheet, correctly label the parts of a table.	2. Type a correctly formatted table which includes a heading, a subheading, and long and short column headings.
II. FORMATTING TABLES	3. Looking at a correctly formatted table, discuss as a group how to calculate the horizontal and vertical placement of table parts.	
A. Vertical placement B. Horizontal placement 1. Key lines 2. Short column headings 3 Long column headings	4. Using a worksheet, correctly calculate the vertical placement of the parts of a table.	
	5. Type the table from the worksheet in correct format.	
	6. Calculate the vertical and horizontal placement and then type the table on a full sheet of paper.	

FORMATTING BUSINESS DOCUMENTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(B)** Identify and apply correct format for business correspondence and documents.

LEARNING OBJECTIVE: Identify the function of each part of a report, and keyboard an unbound report and a leftbound report.

GENERALIZATION: Businesses create reports using standard basic parts. Reports are generated by companies in order to communicate information.

CONTENT OUTLINE

I. BASIC PARTS OF A REPORT

- A. Title page
- B. Table of contents
- C. Body
    - 1. Side heading
    - 2. Paragraph heading
    - 3. Footnotes
- D. Bibliography

II. FORMATTING REPORTS

- A. Placement and spacing of parts
    - 1. Vertical placement
    - 2. Horizontal placement

III. STYLES OF REPORTS

- A. Unbound
- B. Leftbound

LEARNING EXPERIENCE

1. As a group, identify and discuss the functions of the parts of a report.
2. Individually, explain in several short paragraphs the function of each part of a report.
3. Study examples and discuss the formats of leftbound and unbound reports.
4. On a worksheet, indicate the margins and spacing of the parts of a sample report.
5. Keyboard, in acceptable format, a one-page unbound report from a correctly formatted copy.
6. Produce a mailable two-page leftbound report with footnotes from a correctly formatted copy.
7. Referring to correctly formatted examples, type a title page, table of contents, and bibliography in mailable form.

EVALUATION CRITERIA

1. Accurately identify the various parts of a report and explain the function of each part.
2. Answer a written exam on the horizontal and vertical placement of parts of a leftbound report and an unbound report.
3. Produce a mailable two-page unbound report with footnotes, a title page, table of contents, and bibliography.

FORMATTING BUSINESS DOCUMENTS/RESOURCES

TEXTBOOKS

ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE
John Wiley and Sons, Inc.

CLERICAL OFFICE PROCEDURES
South-Western Publishing Co.

OFFICE PROCEDURES
Milady Publishing Co.

THE RESEARCH AND REPORT HANDBOOK FOR BUSINESS, INDUSTRY, AND GOVERNMENT
John Wiley and Sons, Inc.

THE WP BOOK, A REFERENCE MANUAL
John Wiley and Sons

TYPEWRITING: A MASTERY APPROACH
Science Research Associates, Inc.

TYPING 2, ADVANCED COURSE
Gregg/McGraw-Hill Book Co.

TEXT/WORKBOOKS

BASIC LETTER AND MEMO WRITING
South-Western Publishing Company

MAILABLE LETTERS
Gregg/McGraw-Hill

TYPING FROM ROUGH DRAFTS
Milady Publishing Co.

PRACTICE SETS

DAILY BUSINESS COMMUNICATIONS
Films, program guide, and masters
Prentice-Hall Media

PRACTICE SETS FOR BUSINESS: A TYPING SIMULATION
Prentice-Hall Media

THE SECRETARY'S WORKSHOP
Bureau of Business Practice

FORMATTING BUSINESS DOCUMENTS/UNIT OVERVIEW

I. PARTS OF A BUSINESS LETTER

Most businesses use standard basic parts to create a letter.

A. *Dateline*: The dateline consists of the name of the month, the day and the complete year.

   1. Typed a double-space below the letterhead
   2. Somewhere between lines 12 and 15.

B. *Inside Address*: The inside address consists of the name of the person to whom the letter is written and their mailing address. Typed 4 to 12 lines below the date depending on the length of the letter.

C. *Salutation*: The salutation is the formal greeting and is typed a double-space below the inside address.

D. *Body of the Letter*: The body of the letter begins a double-space below the salutation and contains the message.

   1. Paragraphs are usually single-spaced.
   2. Double-space between paragraphs.

E. *Complimentary Close*: The complimentary close is the final farewell and is typed a double-space below the last line of the body.

F. *Signature Line*: The signature line contains the author's name and possibly his/her title. The name is typed four lines below the complimentary close.

G. *Reference Initials*: The reference initials are the typist's initials and possibly the author's initials. These are typed a double-space below the signature line at the left margin.

H. *Enclosure Notations*: Enclosure notations indicate that one or two items in addition to the letter have been included in the envelope. Enclosure notations are typed one or two lines below the reference initials.

II. FLEXIBILITY OF FORMAT WHEN PLACING LETTER PARTS

In order to create a picture-frame effect when typing a letter, it is sometimes necessary to make vertical and horizontal adjustments.

A. *Vertical Placement*: To lengthen or shorten a letter on the page, add or subtract lines before typing the dateline or the inside address.

B. *Horizontal Placement*: Use a 70-space line for long letters and a 60-space line for short/medium letters.

III. STYLE OF BUSINESS LETTERS

A. *Block Style*: All lines begin at the left margin.

B. *Modified Block Style*: All lines begin at the left margin except the dateline, complimentary close, and signature line.

  1. Start these lines beginning at center point.
  2. Paragraphs may be indented five spaces.

C. *AMS Simplified Style*:

  1. Omit the salutation and complimentary closing.
  2. Use block style and a subject line.
     a. The subject line is typed in all-capital letters on the third line after the inside address.
     b. Triple-space after the subject line.
  3. Type the signature line five lines below the body of the letter in all capitals.

IV. TWO-PAGE LETTERS

A. *Carry Over*: At least two lines of the body must carry over to the second page.

B. *Heading*: Include (1) first line of the inside address, (2) page number, and (3) date. Use plain stationery and begin on line 7. After typing the heading, come down three lines before beginning the text.

V. ENVELOPES

A. *Parts of Envelopes*

  1. *Return Address*: The return address contains the name of the company that is sending the letter and the company's mailing address.
     a. If the return address is not already printed on the envelope, single space the return address in the top left corner.
     b. Begin typing on line three, four spaces in from the left edge.
     c. Leave one space between state and zip code.
  2. *Address*: Name of person, company, and address where the letter is being sent.
  3. *Addressee Notations*: Instructions to the company of person receiving the letter.
     (Examples: Hold for Arrival, Personal, Confidential)
  4. *Mailing Notations*: Instructions to the post office.
     (Examples: Special Delivery, Registered)

B. *Placement of Parts*

1. *Large Envelopes*: Begin typing the mailing address on line 15 or 2 1/2 inches from top edge and 4 inches in from the left edge.
2. *Small Envelopes*: Begin typing the mailing address on line 12 or 2 inches from the top and 2 1/2 inches in from the left edge.
3. *Mailing Notations*: Type in all capital letters three lines under the stamp.
4. *Addressee Notations*: Type three lines below the return address. Exception: An attention line is typed below the company name in the mailing address.

VI. REQUIREMENTS OF A MAILABLE BUSINESS DOCUMENT

A. *Neatly and accurately typed*: All errors have been corrected with no obvious corrections visible.

B. *Correct spelling*: All words have been spelled accurately.

C. *Correct punctuation*: Correct punctuation is used according to commonly used standards.

D. *Proper capitalization*: Correct capitalization has been used according to commonly-used standards.

E. *Acceptable word division*: Words divided at the end of typed lines have been correctly divided.

F. *Attractive placement*: Document parts are well placed and balanced on the page.

VII. MEMORANDUMS

A. *Basic Parts of a Memorandum*

1. *Memo Heading*: The memo heading includes:

a.	TO:	To whom the memo is being sent
b.	FROM:	The person sending the memo; the author
c.	DATE:	Date the memo is sent
d.	SUBJECT:	Topic of the memo

2. *Body*: The text/message of the memorandum
3. *Reference Initials*: The initials of the typist

B. *Format of the Memorandum*

1. *Vertical Placement*: Leave at least a one-inch top margin.
    a. *Double-space* the guide words (To, From, Date, Subject).
    b. *Triple-space* after the last guide word before typing the message.
    c. *Single-space* the body.
2. *Horizontal Placement*
    a. *Printed forms*: Set left margin two spaces after the longest guide word. Set right margin to match the measurement of the left margin.

b. *Plain paper*: Use one-inch side margins.

VIII. FORM LETTERS

A. *Purpose*: Form letters are used for routine or large volumes of correspondence.

B. *Adaptability*: Appropriate paragraphs are chosen from standardized copy and variable information is inserted.

C. *Use in word processing*: Many paragraphs may be stored in the word processor and may be merged to create letters. These letters are individualized and error-free.

IX. FORMS

A. *Purpose*: Forms are frequently used in offices to efficiently communicate routine fill-in information.

B. *Design*

1. *Form size*: Size should match standard-size filing equipment.
2. *Captions*: Captions should be easily read and understood.
3. *Spacing*
    a. Writing spaces should be between 1/4 inch high and 1/3 inch high.
    b. Related information should be grouped together and in a logical sequence.
4. Many offices design their own forms using word processing equipment in order to save time and expense.

C. *Completing forms*

1. Adjust the pitch of the typewriter (usually 15) before completing the form.

X. PARTS OF A TABLE

A. *Main heading*: The main heading is the title of the table.

B. *Subheading*: The subheading is an explanation of the title or a subordinate title.

C. *Body*: The body consists of the columns in the table.

D. *Column*: The column is a vertical or horizontal list of information.

E. *Column heading*: The column heading explains what is in each column.

XI. FORMATTING TABLES

A. *Vertical placement*

1. To vertically center a table, count the total lines in the table.

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2. Divide by two.
3. Subtract from the total lines on the page. This number is the line on which to begin typing.

B. *Horizontal placement*

1. *Key line*: Calculate the margins for the table by counting the total spaces of the longest item in each column as well as the number of blank spaces between columns. From center, backspace once for every two characters/spaces in this key line. Set the left margin.
2. *Short column headings*: Center short column headings over the longest item in the column.
3. *Long column headings*: Center the longest item in the column under longer column headings. Set a tab and begin typing all items in the column at this point.

XII. PARTS OF A REPORT

A. *Title page*: The title page presents the full title of a report, any subtitle, author's name, and date.

B. *Table of contents*: A list of all chapters and each chapter's beginning page number.

C. *Body*: The body of a report contains an introduction, the text, and a conclusion. It can also include:

1. Side headings
2. Paragraph headings
3. Footnotes, which are secondary-source references, may be placed at the bottom of each page.

D. *Bibliography*: The bibliography is a list of sources of material used in preparing the report. The bibliography follows the body of the report.

XIII. FORMATTING REPORTS

A. *Title page*

1. Leave a minimum of one-inch top and bottom margins.
2. Use the same side margins as the body of the report.
3. Horizontally center each line.

B. *Table of contents*

1. Leave a two-inch top margin and horizontally center and type CONTENTS.
2. Use double- or single-spacing depending on the length of the table of contents.
3. Use leaders (series of spaced dots) from each topic to its beginning page number.
4. Triple-space after CONTENTS.
5. Triple-space at the completion of each roman numeral section.

C. *Body*

1. Double-space the body of the report.
2. Triple-space before side headings; double-space after. Underline side headings.
3. Indent underlined paragraph headings five spaces. Type a period after the paragraph heading.
4. Footnotes are placed at the bottom of the page on which they are listed.
    a. Use a 1 1/2 inch line to separate the body from the footnotes.
    b. Single-space before the line; double-space after.
    c. Number each footnote to match the text.
    d. Indent the first line of each footnote five spaces.
    e. Single-space footnotes; double-space between footnotes.
5. Leave one-inch top and bottom margins on each page.

D. *Bibliography*

1. Leave a two-inch top margin. Center BIBLIOGRAPHY.
2. Triple-space after bibliography.
3. Single-space each entry; double-space between entries.
4. Indent second lines of each entry five spaces.

E. *Margins for leftbound and unbound reports*

1. *Leftbound*: Use a 1 1/2-inch left margin and a 1-inch right margin.
2. *Unbound*: Use a 1-inch left margin and a 1-inch right margin.
3. Leave at least one-inch bottom margins on each page.

FORMATTING BUSINESS DOCUMENTS/LEARNING ACTIVITY ONE

DIRECTIONS: Using the spaces at the right, identify the parts of the business letter below. On the next page, identify the letter parts by number in the correct order for each letter style listed. Write the format changes required for the letter style in the space entitled "Changes".

OFFICE EDUCATION ASSOCIATION NATIONAL
LEADERSHIP CONFERENCE ______________ 1.

October 26, 1988 ______________ 2.

Enclosure ______________ 3.

Sincerely, ______________ 4.

The national leadership conference for the Office Education Association is planned for April 25-30, 1988. The conference will be held in Louisville, Kentucky. ______________ 5.

Reservations for this year's conference must be made as soon as possible. Please return the enclosed card if you would like the planning committee to make reservations for you. An itinerary of convention activities and your reservation information will then be mailed to you immediately. Thank you for your cooperation in responding promptly.

Jean Johnson ______________ 6.
1514 Center Street
Dallas, Texas 76544

Dear Ms. Johnson: ______________ 7.

cl ______________ 8.

Tom Brown
President

AMS
Simplified ______________________________

Changes: ______________________________

Block ______________________________

Changes: ______________________________

Modified
Block ______________________________

Changes: ______________________________

FORMATTING BUSINESS DOCUMENTS/LEARNING ACTIVITY TWO

DIRECTIONS: Using proofreader's marks, make any necessary corrections to the following letter. Retype the letter in a mailable format.

September 4, 19--

Mr. Albert Villa

Club Regency Hotel

5978 Villaret Drive

Memphis, TN 38134

DearMr. Villa;

Please reserve a rooom for me fer October 14, 15, and 16. I would appreciate a room overlooking the Stanton River if possible

Please hold the reservation for a latearrival on the 14th as my flight does not arrive in Memphis until 8p.m.

I will be glad ot guarantee the reservation with a deposit.

Please mail me a written confirmation, and let me know a if deposit is necessary.

Sincerely,

Gloria Wagner

DIRECTIONS:

1. Keyboard and produce a small envelope addressed to Mrs. Mary K. Anderson; Danex Cleaners; 1903 Buena Vista Parkway; San Antonio, TX 78212. The return address is Michelle Voss; 329 Mimosa; San Antonio, TX 78201. Include the notations "personal" and "registered."

2. Keyboard and produce a large envelope addressed to Ski International; 13032 Trent Street; Colorado Springs, Colorado 80933-7001. The return address is David Mitchell; 5019 Laural Lane; Syracuse, NY 14430. Include the notation "special delivery."

DIRECTIONS: From the following information, produce a mailable letter using the modified block format. Use today's date and assume you are using letterhead stationery.

The following letter is sent to: Mr. Carlos Cantu; 7326 Forest Grove; San Antonio, TX 78204

Dear Mr. Cantu:

Thank you for your inquiry about our college. As a high school junior you are wise to begin searching for just the right college to meet your needs. We believe Corrigan College is the college for you.

Corrigan College is a vital college which places your unique needs and interests at the focus of the educational experience. As a student here, you will develop intellectual self-confidence and expand your leadership abilities.

The campus is located on an attractive, 200-acre campus on the banks of the peaceful Winona River within a 30-minute drive of Verona, a city of 700,000. The buildings were designed by the award-winning architect, George Stanton, who created attractive, inviting buildings. The grounds show attention to detail and are filled with trees, flowers, and students who are studying or enjoying time with friends.

Our faculty ranks among the best in the nation, and they are dedicated to helping you achieve your greatest potential. Small classes with a student-to-faculty ratio of 16:1 promise that your education will be thorough, stimulating and personal.

About 75 percent of our students live in residence halls on the Corrigan College campus where lifelong friendships are formed. The college also helps students locate convenient housing off the campus but within easy walking distance.

The goal at Corrigan is to develop the full potential of every student. The flexibility of the curriculum allows students to choose from over 40 majors to fit their personal and intellectual interests. Our highly-trained counselors are available to assist you in discovering your aptitudes and focusing the direction of your interests into the major of your choice.

The success of our graduates is well known. Over 90 percent of our last three graduating classes have been hired and gone on to develop their careers or they have chosen to attend graduate school.

To receive application materials and learn more about Corrigan College, return the enclosed card. Come join us and be a part of this unique educational experience.

Sincerely,
Kathryn Dunnling
Dean of Admissions
Enclosure

DIRECTIONS: Using the following information, type a memorandum in an acceptable business format. Apply the mailability criteria and use today's date.

TO:

William Brakey

Department Chairman

FROM: Joseph Taylor

Instructor

DATE: January 26, 19--

SUBJECT: Records Management Class Fieldtrip

Our records management students have been invited to join a tour of the records facilities at Data Base Corporation. Karen Thompson, Director of Records Administraiton, has scheduled the tour for Tuesday, February 10, at 2 p.m. The tour should last approximately two hours.

May we have your permission to join this tour, and is it possible for us to have a district van for our transportation?

DIRECTIONS: Type the following memorandum in an acceptable business format. Apply the appropriate mailability criteria and use today's date.

TO: Joseph Taylor

Instructor

FROM: William Brakey

Department Chairman

DATE:

SUBJECT: Records Management Class Fieldtrip

Your records management class field trip to Data Base Corporation has been approved.

A district van and driver have been assigned to your tour on February 10. The van will pick up your students at 1:30 in front of the administration building. The van will wait at Data Base Corporation and bring you back to the campus at the completion of your tour.

PRESIDENTS OF THE UNITED STATES

Serving from 1961 to 1981

President	Political Party	Term in Office
John Fitzgerald Kennedy	Democrat	1961-1963
Lyndon Baines Johnson	Democrat	1963-1969
Gerald Rudolph Ford	Republican	1969-1974
James Earl Carter, Jr.	Democrat	1977-1981

DIRECTIONS: Assume this table is typed on a half sheet of paper. Fill in the blanks with the appropriate answer(s). After completing this worksheet, type this table on a half sheet. Leave six spaces between columns.

1. The main heading is ______________________________.
2. This main heading begins on line ________.
3. The subheading is ______________________________.
4. This subheading begins on line ________.
5. The column headings are ____ ____.
6. Begin these column headings on line ________.
7. Begin typing John Fitzgerald Kennedy on line ________.
8. Circle the key line in each column.
9. If six spaces are left between columns, at what point is the left margin set? ________
10. The tab for the second column is set at ________; the tab for the third column is set at ________.

DIRECTIONS: Type this table on a full sheet of paper leaving eight spaces between columns.

SPANISH-SPEAKING COUNTRIES

Central America

Country	Capital	Area in Square Miles
Guatemala	Guatemala City	42,000
El Salvador	San Salvador	8,300
Honduras	Tegucigalpa	43,000
Costa Rica	San Jose	19,700
Panama	Panama City	28,600

FORMATTING BUSINESS DOCUMENTS/LEARNING ACTIVITY NINE

DIRECTIONS: Complete the following statements with the appropriate answers.

1. When typing a report, leave a bottom margin of _____ inch(es).

2. Most reports require a _____ inch top margin for the first page.

3. Paragraphs should be indented _____ spaces.

4. An unbound report should have _____ inch side margins.

5. A leftbound report should have a left margin of _____ inch(es) and a right margin of _____ inch(es).

6. Long quotations should be single spaced and indented _____ spaces from both the left and right margins.

7. On leftbound and unbound reports, the second and succeeding pages are numbered on line _____ at the right margin.

8. A 1 1/2 inch underline is typed before beginning the footnotes at the bottom of a page. Leave _____ blank line(s) after typing the underline and before typing the first footnote.

9. The first line of each footnote is indented _____ spaces.

10. Each footnote is ________ spaced. ________ space between footnotes.

DIRECTIONS: Type the first page of the report on Charles Kendall Adams in unbound format. Retype the first page using a leftbound format. Apply the standards necessary to produce mailable documents.

CHARLES KENDALL ADAMS

Charles Kendall Adams remains a significant figure in higher education because of his legacy to post-secondary institutions. During his tenure at several universities he secured financial bequests, promoted graduate work, and aided the physical expansion of learning facilities.

Childhood

Charles Adams was born on January 24, 1835, in the rural town of Derby, Vermont. Adams attended the district school in Derby when he wasn't helping his father work their farm. At age 17 he began to teach in the Derby school.

College

His rustic lifestyle continued when his family moved to a farm in Denmark, Iowa, in 1856. For one year Adams studied at the Denmark Academy in preparation for college. According to Adams, this proved to be a meager preparation.[1] He was admitted to the University of Michigan only through the leniency of his examiners. From 1857 to 1861 Adams worked his way through school and studied diligently. Andrew White, professor of history at Michigan, noticed Adams' aptitude and enthusiasm for history and

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[1] Laurence E. Veysey, The Emergence of the American University (Chicago: The University of Chicago Press, 1965), p. 102.

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FORMATTING BUSINESS DOCUMENTS/UNIT TEST

PART 1

DIRECTIONS: Answer the following questions by typing the correct answer in the appropriate blank.

LETTERS:

____________________ 1. The date of a letter is usually typed on line________.

____________________ 2. The inside address is typed ________ lines below the date.

____________________ 3. The part of a letter that might be "Dear Mr. Greene" is called the ________.

____________________ 4. The part of a letter that might be "Sincerely yours," is called the ________.

____________________ 5. Individual paragraphs in a letter are ________ spaced.

____________________ 6. There are ________ blank line(s) between the complimentary close and the signature line.

____________________ 7. There are ________ blank line(s) between the signature line and reference initials.

____________________ 8. If a brochure is placed in the envelope to go with the letter, a/an ________ notation is added to the letter.

____________________ 9. The standard line length for letters is ________ inches.

____________________10. On a large envelope, the mailing address is typed ________ inches from the top edge.

PART 2

DIRECTIONS: Compare and contrast the three basic letter styles: Block, Modified Block, and AMS (Simplified). Spell all terms correctly and use complete sentences.

PART 3

DIRECTIONS: Answer the following questions using complete sentences and spelling terms correctly.

List and briefly describe the four parts in the memorandum heading.

1.

2.

3.

4.

What is the purpose of form letters?

PART 4

DIRECTIONS: Answer the following questions by typing the correct answer in the blank provided.

________ 1. Writing spaces on forms should be between ________ inch(s) and ________ inch(s) high.

________ 2. The ________ line of the table is found by adding the characters and spaces of the longest item in each column plus the spaces between each column.

________ 3. The part of a table most likely to be underlined is the ________.

________ 4. The part of a table that should be centered and typed in all capital letters is the ________.

________ 5. Leave ________ blank lines between the subheading and the column headings.

________ 6. The part of a report that contains an introduction, the text, and a conclusion is the ________.

________ 7. The ________ is a complete list of sources of material used in preparing a report.

________ 8. The heading of the second page of a letter contains the first line of the inside address, the page number and the ________.

________ 9. On an envelope, the notation "Hold for Arrival" should be typed below the ________.

________ 10. The left margin of a bound report should be ________ inches.

________ 11. An unbound report has ________ inch side margins.

________ 12. Type the page number of the second page of a report on line ________.

________ 13. The first page of the body of a report should begin on line ________.

________ 14. Individual footnotes should be ________ spaced.

________ 15. When typing the body of a report, leave a ________ inch bottom margin on each page.

PART 5

DIRECTIONS: Type the following letter in modified block style and type a large envelope to accompany the letter. Assume you are using letterhead stationery and that the envelope has a printed return address.

Send the following letter to Mrs. Carmen Garza; Premiere Energy Corporation; 6654 West Ashby Place; San Antonio, TX 78228.

Dear Mrs. Garza: I enjoyed talking with you the other day and am looking forward to your visit next Tuesday, March 3. As I mentioned on the phone, our word processing class meets in room 112 of the Carter Business Building at 10:30 a.m.

Enclosed is a map of our school and parking facilities. The location of the classroom and suggested parking are marked for your convenience.

Call me if you need any equipment for your presentation or if you need any additional information. My office number is 492-8523.

I'm delighted you are coming to share your extensive knowledge of word processing with our class. See you soon.

Sincerely, Martha Stephens

PART 6

DIRECTIONS: Make all necessary spacing calculations to center the following table both vertically and horizontally. Type the table on a full sheet of paper and use double spacing. Follow all necessary mailability criteria.

NORTHWEST TENNIS CLUB SCHEDULE

January, 1988 - March, 1988

Name	Court Surface	Date of Tournament
Greenspring Courts	clay	January 7-11
Sequin Tennis Club	clay	January 26-30
Midtown Courts	hard	February 16-21
Garnett Tennis Club	grass	March 2-8
Willington Country Club	clay	March 25-29

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FORMATTING BUSINESS DOCUMENTS/ANSWER SHEET

ACTIVITY ONE

1. Subject
2. Date
3. Enclosure notation
4. Complimentary close
5. Body
6. Inside address
7. Salutation
8. Reference initials

The order and changes of letter parts may vary in the last section.

ACTIVITY TWO, THREE, FOUR, FIVE, SIX, EIGHT, AND TEN

These activities may be evaluated to the satisfaction of the instructor.

ACTIVITY SEVEN

1. Presidents of the United States
2. 7
3. Serving from 1961 to 1981
4. 9
5. President, Political Party, Term in Office
6. 12
7. 14
8. Longest line
9. 18 (elite, using 50 as center)
10. 47, 68

ACTIVITY NINE

1. 1
2. 2
3. 5
4. 1
5. 1 1/2
6. 5
7. 7
8. 1
9. 5
10. Single, double

UNIT TEST

Part 1

1. 12 - 15
2. 4 - 12
3. Salutation
4. Complimentary close
5. Single
6. 3
7. 1
8. Enclosure
9. 6
10. 2 1/2

Part 2

Evaluated to the satisfaction of the instructor.

Part 3

Evaluated to the satisfaction of the instructor.

Part 4

1. 1/4" and 1/3"
2. Key
3. Column heading
4. Main heading
5. Two
6. Body
7. Bibliography
8. Date
9. Return address
10. 1 1/2"
11. 1"
12. Seven
13. Thirteen
14. Single
15. One

Part 5

Evaluated to the satisfaction of the instructor.

Part 6

Evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(D)

The student will be provided opportunities to demonstrate proficiency in transcription.

OBJECTIVE:	Identify features of transcription equipment and demonstrate efficient transcription skills and techniques.	MASTERY	NON MASTERY
1.	Identify types of transcription equipment.	____	____
2.	Identify features of transcription equipment.	____	____
3.	Identify efficient transcription techniques.	____	____
4.	Demonstrate ability to transcribe mailable business documents from rough draft copy.	____	____
5.	Demonstrate ability to transcribe mailable business documents from dictated tapes.	____	____
6.	Prepare a document work log.	____	____
		____	____
		____	____

STUDENT NAME ______________________________

TRANSCRIPTION SKILLS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(D)** Demonstrate efficiency in using transcribing equipment.

LEARNING OBJECTIVE: Identify the features of equipment and demonstrate their uses.

GENERALIZATION: Knowledge of transcription skills is essential for efficient performance in today's busy offices.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TERMINOLOGY II. TYPES OF EQUIPMENT A. Portable B. Desktop C. Centralized III. FEATURES OF EQUIPMENT A. Foot pedal B. Headset C. Indicator device D. Recall device E. Speed control device F. Tone control device G. Volume control device	1. Discuss types of transcription equipment. 2. Read equipment instruction manual. 3. Watch demonstration of transcription equipment. 4. Practice operating transcription equipment. 5. Transcribe practice exercises.	1. Identify the parts of the transcribing machine and demonstrate their uses. 2. Identify three types of transcription equipment.

TRANSCRIPTION SKILLS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(D)** Demonstrate efficiency in using transcribing equipment.

LEARNING OBJECTIVE: Identify and demonstrate efficient transcription skills and techniques.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TRANSCRIPTION SKILLS A. Spelling B. Punctuation C. Word usage D. Logical thinking II. FOLOWING INSTRUCTIONS A. Written B. Dictated III. TRANSCRIPTION TECHNIQUES A. Listening B. Thought units C. Continuous keyboarding IV. DOCUMENT FORMATTING V. DOCUMENT LOGGING	1. Discuss tips to improve transcription techniques. 2. Transcribe mailable business documents from rough draft copy. 3. Transcribe mailable business documents from dictated tapes. 4. Fill out document work log. 5. Practice spelling exercises.	1. Transcribe letters and envelopes using correct machine controls. 2. Transcribe a report using correct machine controls. 3. Complete written test on transcription techniques, spelling, and punctuation rules.

TRANSCRIPTION SKILLS/RESOURCES

TEXT/WORKBOOKS

GUIDE TO TRANSCRIPTION
MPC Educational Publisher

MACHINE TRANSCRIPTION
Text-workbook, cassettes
Glencoe Publishing Co.

MACHINE TRANSCRIPTION WORD PROCESSING
South-Western Publishing Co.

MACHINE TRANSCRIPTION:
A COMPREHENSIVE APPROACH TO
TODAY'S OFFICE SPECIALIST
Text, working papers, and tapes
Bobbs-Merrill Educational Publishing

TRANSCRIBING TRAINING TECHNIQUES
Vocational Education Media Center
Clemson University

WORD PROCESSING
ESP, Inc. Productions

WORD PROCESSING IN THE MODERN OFFICE
The Benjamin/Cummings Publishing Co., Inc.

WORD PROCESSING: MACHINE TRANSCRIPTION
Milady Publishing Co.

WORD PROCESSING SKILLS AND SIMULATIONS
Bobbs-Merrill Educational Publishing Co., Inc.

TAPES

LANIER MACHINE TRANSCRIPTION COURSE
Lanier Business Products, Inc.

LANIER SECRETARIAL TRANSCRIPTION COURSE
Lanier Business Products, Inc.

MACHINE TRANSCRIPTION PRACTICE
Western Tape

MACHINE TRANSCRIPTION WORD PROCESSING
South-Western Publishing Co.

NEW YORK MACHINE TRANSCRIPTION COURSE
Western Tape

SECRETARIAL PRACTICE COURSE
Dictaphone Corporation

SONY DCC SECRETARIAL TRAINING COURSE
Sony Information Products

TRANSCRIPTION SKILLS FOR INFORMATION PROCESSING
Gregg/McGraw Hill Publishing Co.

TRANSCRIPTION SKILLS/UNIT OVERVIEW

I. TERMINOLOGY

A. *Central recording media*: group of dictation and transcription units connected electronically to a main recording device.

B. *Continuous keyboarding*: process of transcribing without stopping.

C. *Dictation unit*: a device into which information can be entered and recorded.

D. *Discrete media*: equipment that uses a recording medium which can be removed.

E. *Endless loop system*: uses an endless loop of magnetic tape enclosed in a tank.

F. *Recording media*: magnetic supplies used to record and store information (i.e. floppy disc or cassette).

G. *Transcribe*: to produce a typed document from recorded dictation.

H. *Transcription unit* : a device used to play back recorded dictation for transcribing.

I. *Transcriptionist*: the person who produces recorded words into typewritten form.

II. TYPES OF EQUIPMENT

Transcription equipment is categorized by the type of recording media used, either discrete or endless loop media.

A. *Discrete media equipment* - uses a recording medium which can be removed from the dictation unit and placed in a transcription unit for playback or filed for later use.

1. *Types of Discrete Media Equipment*

   a. Portable dictation unit - a self-contained, hand-held unit which enables the dictator to dictate material outside the office at any time; the recording medium is placed in a transcription unit for the typist to transcribe.

   b. Desk-top unit - three styles of desk-top units are available:

      (1) A dictation unit
      (2) A transcription unit
      (3) A combination unit with both dictation/transcription capabilities

   c. Centralized recording system - the recording unit is connected to the dictating devices by telephone lines and a telephone is located on each dictator's desk.

   d. Transcription unit - used by the transcriptionist to play back material for keying.

      (1) Listening device (headset)
      (2) Foot pedal control
      (3) Playback unit

III. FEATURES OF EQUIPMENT

A. *Foot pedal* - used to start and stop dictation and to replay the dictation.

B. *Headset* - used to listen to dictation.

C. *Indicator slip* - designates special instructions and length of each item dictated.

D. *Recall device* - used to automatically replay the last few words of the dictation.

E. *Speed control* device - used to increase or decrease the speed of dictation.

F. *One control device* - used to adjust the pitch of the dictator's voice.

G. *Volume control device* - used to control the loudness and softness of the dictation.

IV. TRANSCRIPTION SKILLS

A. *Keyboarding*

B. *Editing*

C. *Spelling*

D. *Correct word usage*

E. *Punctuation*

F. *Logical thinking*

G. *Following written and dictated instructions*

V. TRANSCRIPTION TECHNIQUES

A. *Listening* - listen closely for phrases or sentences that do not make sense and consult the dictator.

B. *Thought units* - listen to a group of words or phrases that makes sense, then keyboard the thought.

C. *Continuous keyboarding* - learn to depress footpedal, listen, and keyboard without stopping. Developing this skill takes practice.

D. *Proofread the transcript* carefully before and after printing it.

VI. TRANSCRIPTION PROCEDURES

A. *Organize work area* with reference materials available.

B. *Preview the dictation* for special instructions.

C. Determine the *correct format* for each item.

D. Adjust the *volume*, *speed*, and *tone* controls.

VII. DOCUMENT LOGGING

A. *Setting priorities*

B. *Special instructions document*

C. Determines *time document received* and time returned

D. Determines *time document started* and time completed

E. *Record-keeping* and *billing*

DIRECTIONS: Assume that you are working as an information processing specialist for Career Consultants, Inc., and the following letter is being dictated to you. Format the letter in block style and use the current date.

"Operator, this is Michael R. Green, President, Career Consultants, Inc. Please type the following letter on my letterhead, make one file copy, and address an envelope. Address the letter to Mrs. Juanette, J-U-A-N-E-T-T-E, Klein (with a K), Sales Director, Technico, inc., (T-E-C-H-N-I-C-O), Five zero two eight Manor (M-A-N-O-R) Road, Austin comma TX Zip seven eight seven zero 2 hyphen four two three five. Dear Mrs. Klein: Subject colon Employees', E-M-P-L-O-Y-E-E-S apostrophe, Pension Plan Enclosed are the newly released regulations for the pension plan for our employees. You will notice that all of our employees are now covered in our plan, whether they are full hyphen time or part hyphen time. Paragraph. I hope that this information will be helpful to you in revising the pension plan for your business, correction, company. If I can be of further help, please feel free to call on me. Very truly yours, Operator, please refer to Mrs. Kleins title at the beginning of the letter--that should be Director of Sales."

TRANSCRIPTION SKILLS/ACTIVITY TWO

INSTRUCTIONS: Keyboard the following rough draft report, making all needed corrections. Proofread carefully when you complete the document, and reprint it if there are errors.

INFORMATION PROCESSING SKILLS

As the use of information processing in business gorws, the need for qualified personel increases. Employers are looking for applicants with the following basic skills:

1. Keyboarding skills--a minnimun keyboarding spped of 45 to 55 words per min.; the ability to type from rough drafts, longhand, and machine dictation.

2. Machine transcription Skills-- be familiar with machine transcription techniques and procedures.

3 Proofreading--be familiar with and possess giid proofreading techniques.

4. Grammatical skills--the ability to spell, punctuate; and capitalize; the ability to recognize sentence correct structures, paragraphing, and sequencing; and the ability to graps and under-stand what is being read.

5. Use of resource material--posses the skill to properly use reference sources.

6. Math skills--possess basic math skills in order to set up charts and statiscial tables; to gigure production rates, and to determine placement of material on a page.

7. Concepts and theory or Information Processing--possess the knowledge of what word processing is all about.

If applicants possess these seven basic skills, they are prepared for the business world and also qualified for an entry-level position in informtion proecssing.

TRANSCRIPTION SKILLS/ACTIVITY THREE

INSTRUCTIONS: Obtain transcription tapes from your instructor. Using a transcription unit, transcribe the tapes, practicing the following transcribing procedures:

1. Organize your work area.
2. Place the recording medium in the transcribing unit.
3. Turn the unit on.
4. Preview the dictation.
5. Listen to the first item to be transcribed.
6. Mentally punctuate the material.
7. Make notes on words to check for spelling and special instructions.
8. Adjust the volume, speed, and tone controls.
9. Determine the approximate length of the dictation in order to set margins.
10. Determine the correct format for each item to be prepared.
11. Transcribe the material according to priorities given by the dictator.

TRANSCRIPTION SKILLS/UNIT TEST

INSTRUCTIONS: Indicate whether the following statements are true or false by circling T or F.

T F 1. Transcribing equipment is categorized by the type of recording media used.

T F 2. Dictation/ transcription equipment enables the transcriptionist to work closely with the dictator.

T F 3. Electronic cueing is used to indicate special instructions.

T F 4. A centralized recording system uses an endless loop tank.

T F 5. Discrete media equipment uses a removable recording medium.

T F 6. A transcription unit is used to record dictation.

T F 7. There are three styles of desk-top units.

T F 8. Punctuation and paragraphs are not dictated.

T F 9. The dictator should possess keyboarding skills.

T F 10. The index slip is used to indicate the length of each item dictated.

11. List five skills required of a transcriptionist.

12. List five features of transcribing equipment.

13. Identify the sequence of the transcription process and explain each step.

TRANSCRIPTION SKILLS/ANSWER SHEET

ACTIVITIES

All activities will be evaluated to the satisfaction of the instructor.

TEST

1. T
2. F
3. T
4. T
5. T
6. F
7. T
8. F
9. F
10. T
11.
    1. Keyboarding
    2. Editing
    3. Spelling
    4. Correct word usage
    5. Punctuation
12.
    1. Footpedal
    2. Headset
    3. Indicator slip
    4. Recall device
    5. Speed control
    6. Tone control
    7. Volume control
13. This will be evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(C)

The student will be provided the opportunity to demonstrate basic information processing concepts and processes to employ the appropriate steps in the document production.

OBJECTIVE:	Demonstrate competency in skills using the concepts of word processing in creating and formatting documents.	MASTERY	NON MASTERY
1.	Describe how to use the function keys or command keys on the system.	______	______
2.	Identify what function each key performs.	______	______
3.	Demonstrate how to use the code or alternate key and how it affects the keyboard.	______	______
4.	Demonstrate how to use the insert/replace keys and which is the default of the system.	______	______
5.	Demonstrate how to use the delete function, including word, line, or sentence deleting.	______	______
6.	Demonstrate how to save a document.	______	______
7.	Demonstrate how to send a document to the printer.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

WORD PROCESSING CONCEPTS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(C)** Demonstrate basic information processing concepts and processes to employ the appropriate steps in document production.

LEARNING OBJECTIVE: Demonstrate competency in skills using the concepts of word processing in creating and formatting documents.

GENERALIZATION: Word processing is the most frequently used skill on personal computers in the automated office.

CONTENT OUTLINE

I. TERMINOLOGY

II. ROLE OF WORD PROCESSING

III. ADVANTAGES OF WORD PROCESSING

IV. PRODUCTION COMPONENTS

V. CATEGORIES OF WORD PROCESSING

VI. CHOOSING WORD PROCESSING SOFTWARE

LEARNING EXPERIENCE

1. View a demonstration of the document cycle using word processing software.
2. Practice handling storage media, organizing disks, labeling disks, initializing disks, naming documents on disks, and proper care of disks.
3. Produce five documents performing the following functions:
   a. move from menu to menu
   b. respond to prompts on the screen
   c. use the proper keystrokes to display and use any menu available on the system

EVALUATION CRITERIA

1. Define terminology relating to word processing concepts.
2. Describe in writing all of the functions available to the system.
3. Describe the role of word processing in the automated office.

WORD PROCESSING CONCEPTS/RESOURCES

TEXT/WORKBOOKS

APPLEWORKS: INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
text-workbook, diskettes
South-Western Publishing Co.

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
text-workbook, tests
South-Western Publishing Co.

COMMUNICATION SKILLS FOR WORD PROCESSING
Harcourt, Brace, and Jovanovich Publishing Co.

CONSULTAMATION, INC.: WORD PROCESSING PRACTICE AND APPLICATIONS
text-workbook, dictation tapes, manual
Gregg/McGraw-Hill

COPY PROCESSING
text, manual, Glenco Publishing Co.

DEVELOPING CONCEPTS FOR WORD PROCESSING
Gregg/McGraw-Hill

DEVELOPING EDITING SKILL
text-workbook, manual
Gregg/McGraw-Hill

DEVELOPING PROOFREADING SKILL
text-workbook, manual
Gregg/McGraw-Hill

EDITED COPY FOR WORD PROCESSING
text-workbook
Dictation Disk Co.

THE ELECTRONIC OFFICE AND YOU: WORD PROCESSING CONCEPTS
text-workbook, manual
Gregg/McGraw-Hill.

GLENCO WORD PROCESSING: A PRACTICAL GUIDE TO CONCEPTS AND APPLICATIONS
text, workbook, manual and key
Glenco Publishing Co.

INTEGRATED KEYBOARDING/COMMUNICATION SKILLS
text-workbook
South-Western Publishing Co.

INTRODUCTION TO APPLE WRITER WORD PROCESSING
text-workbook
South-Western Publishing Co.

INTRODUCTION TO WORD PROCESSING
Bobbs-Merrill Educational Publishers

INTRODUCTION TO WORD PROCESSING
Winthrop Publishers, Inc.

LEARNING WORD PROCESSING CONCEPTS USING APPLE WRITER
text, manual
Gregg/McGraw-Hill

MANAGEMENT OF WORD PROCESSING OPERATIONS
The Benjamin/Cummings Publishing Co., Inc.

OFFICE PROCEDURES AND TECHNOLOGY
textbook
Milady Publishing Co.

101 WORD PROCESSING EXERCISES
Gregg/McGraw-Hill

SKILL BUILDING EXERCISES FOR THE WORD PROCESSOR
text-workbook
Dictation Disk Co.

WORD PROCESSING
Milliken Publishing Co.

WORD PROCESSING, A COMPREHENSIVE TRAINING PROGRAM
ESP, Inc. Productions

WORD PROCESSING APPLICATIONS FOR ELECTRONIC TYPEWRITERS
text-workbook
Houghton Mifflin

WORD PROCESSING APPLICATIONS FOR TEXT EDITORS
Text-workbook
Houghton Mifflin

WORD PROCESSING CONCEPTS
South-Western Publishing Co.

WORD PROCESSING: OPERATIONS, APPLICATIONS, AND ADMINISTRATION
Bobbs-Merrill Educational Publishers

WORD PROCESSING SUPERVISION
text, guide
Bobbs-Merrill Educational Publishers

WORKING YOUR WAY THROUGH WORDSTAR
text-workbook
South-Western Publishing Co.

MAGAZINES

ADMINISTRATIVE MANAGEMENT
P.O. Box 13205
Philadelphia, PA 19101

MODERN OFFICE PROCEDURES
P.O. Box 95759
Cleveland, OH 44101

THE OFFICE
Office Publications, Inc.
P.O. Box 13205
Philadelphia, PA 19101

THE SECRETARY
National Secretaries Association World
Headquarters
2440 Pershing RD., Suite G-10
Kansas City, MO 64108

WORD PROCESSING WORLD
Geyer-McAllister Publishers, Inc.
51Madison Avenue
New York, NY 10010

WORDS
IWP Association
Maryland Road
Willow, Grove, PA 19090

FILMS

BASIC SKILLS IN WORD PROCESSING: THE UNIVERSAL APPROACH
filmstrips, guides and manual
South-Western Publishing Co.

DISTRIBUTION AND RETENTION
11 filmstrips, cassettes, guide
Prentice-Hall Media

GENERATING DOCUMENTS
2 filmstrips, cassettes, guide
Prentice-Hall Media

IBM MOTION PICTURE LIBRARY
Modern Talking Pictures Services,
2323 New Hyde Park Road
New Hyde Park, NY 11040

AN INTRODUCTION TO WORD PROCESSING
3 filmstrips, cassettes, guide
Prentice-Hall Media

INTRODUCTION TO WORD PROCESSING
filmstrip
J. Weston Walsh

KEYBOARDING AND EDITING
4 filmstrips, cassettes, guide
Prentice-Hall Media

WORD PROCESSING AND THE CHANGING OFFICE ENVIRONMENT
student activities and projects, filmstrips
South-Western Publishing Co.

WORD PROCESSING IN ACTION!
sound filmstrips
Glenco Publishing Co.

SIMULATIONS

THE CORRESPONDENCE SECRETARY-- SIMULATION PROJECT
workbook, student and teacher manual, tapes
Milady Publishing Co.

MERCURY SYSTEMS, INC.: PRACTICE SET IN WORD/INFORMATION PROCESSING
Gregg/McGraw-Hill

SUN ISLAND HOTEL - A WORD PROCESSING SIMULATION
text-workbook
Harcourt, Brace, and Jovanovich Publishing Co.

TRIANGLE BROADCASTING CO.: A WORD/INFORMATION PROCESSING SIMULATION
text, working papers, guide, and tapes
Bobbs-Merrill Educational Publishers

WORD PROCESSING SKILLS AND SIMULATIONS
text, manual
Bobbs-Merrill Educational Publishers

THE WORD PROCESSING SPECIALIST, INFO-TEC-OFFICE JOB SIMULATION
dictation cassette
South-Western Publishing Co.

SOFTWARE

APPLEWORKS: INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
text-workbook, diskettes
South-Western Publishing Co.

THE EXECUTIVE SECRETARY
Word/Information Processing System disk,
manual for Apple II, II +, IIe, IIc, IBM-PC, IBM-XT

GREGG KEYBOARDING FOR INFORMATION PROCESSING
3 disks for TRS-80 Model III, Apple II, II +,
Gregg/McGraw-Hill

MISCELLANEOUS

DATAPOINT CORPORATE COMMUNICATIONS
San Antonio, TX 78284

INFORMATION MANAGEMENT CORPORATION
P.O. Box 787
Solana Beach, CA 92075

LANIER
Atlanta, GA 30301

OYX
Exxon Information Systems
Lionville, PA 19353

WANG LABORATORIES, INC.
Lowell, MA 01851

XEROX CORPORATION
Office Products Division
Dallas, TX 75247

ZENITH DATA SYSTEMS
Peoria, IL 61614

WORD PROCESSING CONCEPTS/UNIT OVERVIEW

I. TERMINOLOGY

A. *Cathode Ray Tube(CRT)*: A screen that makes it possible to produce a document in the document cycle without the use of paper.

B. *Command Keys*: Keys that request the word processing software to instruct the processor to do something.

C. *Draft*: A rough, unedited copy.

D. *Dual Function or Code Keys*: A key that can perform two functions and usually used together with a control or code key. They may be identified by having words written on the top and the front side of the key.

E. *Formatting Keys*: Function keys that control the physical layout of a document, such as margins, page length, vertical line spacing, tabs, indentations, centering, etc.

F. *Hard Copy:* written, typed, or printed copy; a document.

G. *Keyboarding*: "Typing", entering information by operating a keyboard.

H. *Locating Keys*: A key used to find information saved in temporary memory or on permanent storage media.

I. *Procedure*: The step-by-step process for completing a job.

J. *Proofreading*: Reading copy to find and mark errors for correction.

K. *Purge*: To remove obsolete files from the system.

L. *Repetitive Typing*: Documents, such as form letters, which are played back over and over.

M. *Revision*: Editing and making typewritten correction.

N. *Schedule Log*: A form, prepared and maintained by a supervisor, designed to keep track of incoming and outgoing work in the word processing center.

O. *Soft Copy*: Information stored on a magnetic medium or on CRT screen.

P. *Software*: A program that instructs the operations of word and data processing equipment; all non-hardware elements of a computer system, such as computer programs, procedures for training and operating, support documentation, design and test documentation, etc.

Q. *Storage Media*: Media where information is stored.

R. *Word Processing Center*: The room or designated area with equipment and personnel for processing written communication.

S. *Word Processing System*: The combination of specific procedures, methods, equipment, and people designed to perform and improve the input, output, and distribution of written communication.

T. *Work Station*: A work area for one person.

II. ROLE OF WORD PROCESSING

A. Manipulates *text* electronically

B. Most *widely used function* of the personal computer in the automated office

III. ADVANTAGES OF WORD PROCESSING

A. *Enhances quality* of text

B. *Facilitates revisions* to document

C. Serves as *input* into electronic filing systems

D. Allows for *software integration*

IV. CATEGORIES OF WORD PROCESSORS

A. *Electronic* typewriters

B. *Stand-alone* word processors

C. *Shared-logic* systems

D. *Distributed* word processing systems

E. *Personal computer* word processing

F. Computer *time-sharing* systems

V. PRODUCTION COMPONENTS

A. *Cursor* serves as a visual pointer.

B. *Scrolling* moves text into display screen.

C. *Prompts* give instructional messages.

D. *Menus* display commands.

E. *Numeric keypad* has number keys arranged like a calculator.

VI. PRODUCTION CONCEPTS

A. *Formatting* a document:

1. Decide *size of page* and how printed document should look.

2. Set *margins*, *tabs*, *line* and *character spacing* in the format line.

3. Right and left *margins* can be *justified*.

B. *Inputting* text:

1. Text can be entered in the *replace* mode or *insert* mode.
   a. Replace mode overstrikes character.
   b. Insert mode adds text.

2. *Screen editing* lets you move the cursor anywhere on the screen to insert or replace text.

3. *Scrolling* on the screen can be done a line or a page at a time.

4. *Word wrap* performs the carriage return.
   a. Line lengths stay within the margins.
   b. Text can be entered continuously.
   c. In the insert mode, text wraps around to the next line while inserting new text.

C. *Block operations*:

1. Manipulate fairly *large amounts* of text.

2. *Copy*, *move* and *delete* commands
   a. *Delete* feature removes unwanted text.
   b. *Insert* feature adds text when needed.
   c. *Replace* feature substitutes text.
   d. *Move* feature takes text from one place to another.
   e. *Merge* feature combines text to create new document.

D. The *search* features:

1. *Search and replace* allow entering a search and replace string for selective replacement.

2. *Global search* and *replace* command is used for advanced revisions.

E. *Text enhancement features*:

1. To *adjust text*, use centering or indent block.

2. For emphasis, *boldface* and *underline* can be used.

3. *Headers* and *footers* can be used as descriptive titles throughout a document, and usually refer to title, subject, author, date, and page number.

4. *Pagination* numbers pages automatically.

F. *Document printing*:

1. Select *print option* from the main menu.
2. Several print options are available, such as line *spacing*, *margins*, *font size*, etc.

G. *File features*:

1. The *file* is the version of the document that is on the disk.
2. A file can be *saved*, *retrieved*, *deleted*, or *merged*.
3. The *operator defines* the file name to identify the document.

H. *Advanced features*:

1. Automatic generation of *table of contents*
2. *Footnoting*
3. *Index* of key words
4. *Thesaurus*
5. *Spell checker*
6. *Grammar checker*

VII. CHOOSING WORD PROCESSING SOFTWARE

A. Software should *help the writer* complete a task with the least possible interruptions.

B. *Program operation*, *disk storage*, and *menu design* should help the user avoid mistakes.

C. *Program operation* should be faster than a good typist.

D. *Display screen* should reflect the finished document as much as possible.

E. *Printer interfacing* should be simple and flexible.

F. A *good manual* is a necessity.

G. *Operating manuals*, *help screens*, and *tutorials* should be clear and well illustrated.

WORD PROCESSING CONCEPTS/ACTIVITY ONE

DIRECTIONS: Next to each word in the list below write the category with which it is normally associated (INPUT, OUTPUT, COMMUNICATION/DISTRIBUTION). Some words may belong in more than one category.

Departmental mail ______________________________

Form letters ______________________________

Machine dictation ______________________________

Transcription ______________________________

Automatic typewriter ______________________________

Communicating test-editor ______________________________

Messenger ______________________________

U.S. Postal Service ______________________________

Photocomposition ______________________________

Editing and revising ______________________________

Facsimile ______________________________

Data Communications ______________________________

OCR ______________________________

Combined repetitive and variable typing ______________________________

Form dictation ______________________________

Printers ______________________________

Shorthand ______________________________

Repetitive typing ______________________________

Telex-TWX ______________________________

Longhand ______________________________

Mechanical text-editor ______________________________

WORD PROCESSING CONCEPTS/ACTIVITY TWO

DIRECTIONS: Identify the following items by indicating to which category each belongs. Use the key below. If an item does not belong to categories A, B, C, or D, write E in the space provided.

A - a method of input

B - a method of output

C - a form of output

D - a type of word processing output equipment

E - none of the above

__________ 1. Form letter

__________ 2. Longhand

__________ 3. Repetitive typing

__________ 4. Backlog

__________ 5. Shared logic text-editors

__________ 6. Memorandum

__________ 7. Transcription process

__________ 8. Automatic typewriters

__________ 9. Facsimile

__________10. Report

__________11. Editing and revising process

__________12. OCR scanner

__________13. Printer

__________14. Machine dictation

__________15. Magnetic tape

__________16. Letter

__________17. Statistical information

__________18. Combined repetitive and variable typing

__________19. Visual display text-editor

__________20. Shorthand

DIRECTIONS: Visit a business which uses word processing equipment and interview a person employed in a word processing position. Ask some of the following questions and record the answers in the spaces provided.

1. What is your career title?

2. What tasks do you perform on your job?

3. What educational training and occupational experience is required for this job?

4. What personality traits are most important in your field?

5. What skills and knowledge are required in this occupation?

6. What is the approximate starting salary of workers in your occupation?

7. What is the employment outlook for the future in this career?

8. What word processing structure is used by your company?

9. What word processing equipment do you use?

WORD PROCESSING CONCEPTS/ACTIVITY FOUR

DIRECTIONS: Proofread, edit, revise, and keyboard the following letter to produce a mailable document. Remember to use the correct function keys, including the spell check function.

November 3, 19--

Ms. Susan Anderson
ETSU Station,
P.O. Box 837
East Texas State University
Commerce Texas 75428

Dear Susan:

Our company is pleased to assist you with your research project about trunover rate in east Texas. We are happy to answer your questions from data we have on file and from personal abservations.

Jack Ballinger was instrumental in preparing the enclosed report. It should answer your questions and it will be an asset to my department as well. I agree with your thesis that education of employees is an important factor. Well-trained-employees are and asset to the company and tend to remain with the company for a longer tennure.

May you have success in your project! I look forward to seeing a copy of it. If we can be of assistance, please call upon us.

Sincerely,

Chris Stover, Personnel Manager

gg

enclosure

WORD PROCESSING CONCEPTS/UNIT TEST

DIRECTIONS: Match the definitions below with the list of terms on the following page.

__________ 1. Documents such as form letters which are played back over and over.

__________ 2. Editing and making typewritten corrections.

__________ 3. Several text-editors that use the memory and processing power of a computer.

__________ 4. Information stored on a magnetic medium or on a CRT screen.

__________ 5. Programs which instruct or control the operations of a computer.

__________ 6. Any device capable of sending or receiving information over a communications channel.

__________ 7. To produce a typed document from recorded dictation.

__________ 8. To send from one person or place to another.

__________ 9. The amount of time that lapses from the time a document is put into a system, to the point that it is produced in final form.

__________10. A work area for one person.

__________11. The printing-out of information which has been recorded.

__________12. Cathode ray tube screen.

__________13. The final results after input is processed, revised, and printed out.

__________14. Correcting and revising copy before it is put into final form and printed.

__________15. The operating conditions of a unit.

__________16. A device which transmits a picture of the hard copy over existing telephone lines.

__________17. Instructions which are programmed into a system to make it perform all designated functions.

__________18. Written, typed, or printed copy.

__________19. A device which prints one line at a time.

__________20. The electronic, magnetic, and mechanical devices used in a system.

__________21. Linking two machines or systems together.

__________22. Another term for a word processing center.

__________23. Duties performed.

________24. The room or designated area with equipment and personnel for processing written communication.

________25. Information or ideas in raw form.

A. Line printing
B. Transmit
C. Shared-logic
D. Play back
E. Hardware
F. Repetitive typing
G. Mode
H. Correspondence center
I. Hard copy
J. Soft copy
K. Software
L. Logic
M. Tasks

N. Turnaround time
O. Interface
P. CRT screen
Q. Revision
R. Facsimile
S. Terminal
T. Transcribe
U. Editing
V. Output
W. Work station
X. Word processing center
Y. Input

WORD PROCESSING CONCEPTS/ANSWER SHEET

ACTIVITY ONE

Departmental mail	COMMUNICATION/DISTRIBUTION
Form letters	COMMUNICATION/DISTRIBUTION
Machine dictation	INPUT
Transcription	INPUT
Automatic typewriter	INPUT, OUTPUT
Communicating test-editor	INPUT
Messenger	COMMUNICATION/DISTRIBUTION
U.S. Postal Service	COMMUNICATION/DISTRIBUTION
Editing and revising	INPUT
Facsimile	COMMUNICATION/DISTRIBUTION
Data Communications	COMMUNICATION/DISTRIBUTION
OCR	COMMUNICATION/DISTRIBUTION
Combined repetitive and variable typing	INPUT
Form dictation	INPUT
Printers	OUTPUT
Shorthand	INPUT
Repetitive typing	INPUT
Telex-TWX	COMMUNICATION/DISTRIBUTION
Longhand	INPUT
Mechanical text-editor	INPUT

WORD PROCESSING CONCEPTS/ANSWER SHEET (continued)

ACTIVITY TWO

1. C
2. A
3. B
4. E
5. D
6. C
7. A
8. D
9. D
10. C
11. E
12. D
13. D
14. A
15. B
16. C
17. C
18. B
19. D
20. A

ACTIVITY THREE

Evaluated to the satisfaction of the instructor.

ACTIVITY FOUR

November 3, 19--

Ms. Susan Anderson
ETSU Station,
P.O. Box 837
East Texas State University
Commerce, ~~Texas~~ TX 75428

Dear ~~Susan~~ Ms. Anderson:

Our company is pleased to ~~help~~ assist you with your research ~~about trurnover rate~~ concerning employment trends in the east Texas area. We are happy to answer your questions from data ~~we have~~ on file and from personal abservations about our company's employment policies.

Jack Ballinger in our personnel department was instrumental in preparing the enclosed report. It should answer your questions and ~~it~~ the compilation of these facts will be an asset to my department as well. I agree with your thesis that education of employees is an important factor in personnel turnover. Well-trained employees are an~~d~~ asset ~~to the company~~ and tend to remain with the company for a longer tennure.

May you have complete success in ~~your~~ the project you are undertaking. I look forward to seeing a copy of ~~it~~ the final report. If we can be of further assistance, please feel free to call upon us.

Sincerely,

Chris Stover, Personnel Manager

gg

enclosure

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Sincerely,

Chris Stover
Personnel Manager

gg

Enclosure

WORD PROCESSING CONCEPTS/ANSWER SHEET

UNIT TEST

1.	F
2.	Q
3.	C
4.	J
5.	K
Y.	S
7.	T
8.	B
9.	N
10.	W
11.	D
12.	P
13.	V
14.	U
15.	G
16.	R
17.	L
18.	I
19.	A
20.	E
21.	O
22.	H
23.	M
24.	X
25.	Y

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)

The student will be provided an opportunity to identify and demonstrate concepts and skills related to effective communication and production of business documents.

OBJECTIVE:	Demonstrate basic information processing concepts and processes to employ the appropriate steps in document production.	MASTERY	NON MASTERY
1.	Know and understand terminology and procedures related to the document production cycle.	______	______
2.	Create, revise, spell check and produce a document.	______	______
3.	Produce documents to include the following format change decisions: A. Line spacing B. Line alignment C. Type styles D. Margin adjustments E. Headers and footers	______	______
4.	Demonstrate ability to spell check document.	______	______
5.	Demonstrate ability to use an integrated software package.	______	______
6.	Demonstrate ability to merge items from other documents to create a new document.	______	______
7.	Demonstrate ability to use the search and replace function.	______	______
		______	______
		______	______

STUDENT NAME______________________________

DOCUMENT PRODUCTION/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87 (c)(1)** Identify and demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Identify and use terminology related to information processing.

GENERALIZATION: To work effectively in an automated office, workers must be familiar with and able to use terms related to text processing.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
TERMINOLOGY RELATED TO DOCUMENT PRODUCTION (See glossary for definitions)	1. Discuss terminology related to word processing.	1. Correctly define terms.
I. ORIGINATION A. Originator B. Principal C. Machine Dictation D. Shorthand	2. Complete crossword puzzles using definitions as clues. 3. Define identified terms in student's own words.	
II. KEYBOARD A. Formatting keys B. Locating keys C. Editing keys D. Dual function or code keys E. Command keys		
III. PROOFREADERS MARKS		

DOCUMENT PRODUCTION/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
IV. PRINTERS		
A. Impact printers		
B. Non-impact printers		
C. Plotters		
V. REPROGRAPHICS		
VI. FILE MANAGEMENT		
A. Storage media		
B. Purge		
VII. DISTRIBUTION		
A. U.S. Postal Services		
B. Facsimile		
C. Electronic mail		
D. Transmission systems		
E. Audio communication systems		

DOCUMENT PRODUCTION/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)** Identify and demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Demonstrate basic information processing concepts and processes to employ the appropriate steps in document production.

GENERALIZATION: Information processing operators generate and revise letters, memos, and reports using automated equipment with appropriate software and peripherals.

CONTENT OUTLINE

DOCUMENT PRODUCTION

I. ORIGINATION
  A. Originator
  B. Origination methods
  C. Transcriptionist

II. PROCESSING DOCUMENTS
  A. Input methods
    1. Keyboard
    2. OCR
    3. Microfilm
    4. Voice processing
  B. Proofreading
  C. Revising documents

III. PRINTING DOCUMENTS

LEARNING EXPERIENCE

1. List and briefly discuss the five steps of the document cycle.
2. Given a situation, the student will compose a letter, memo, report, or other document.
3. After becoming familiar with a word processing system, the student will input documents of various types.
4. Proofread, correct, and revise documents previously input.
5. Print documents previously input.

EVALUATION CRITERIA

1. After becoming familiar with and practicing on a word processing system, students will produce mailable letters, memos, reports, and/or other business documents.

DOCUMENT PRODUCTION/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
IV. REPROGRAPHICS		
V. STORAGE AND RETRIEVAL OF DOCUMENTS		
VI. DISTRIBUTION		

DOCUMENT PRODUCTION/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)** Identify and demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Apply appropriate procedures for proofreading and correcting errors.

GENERALIZATION: Accurate document production is a high priority in a business environment.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
PROCESSING I. PROOFREADING 1. Standard proofreading marks 2. Use of reference materials 3. Proofreading techniques 4. Review by originator II. CORRECT ERRORS AND REVISE	1. Using overhead projector or printed handout, discuss standard proofreading marks and proofreading techniques. 2. Given various documents containing errors in spelling, punctuation, capitalization, and grammar, student will mark errors. 3. Student will proofread all documents he/she produces. 4. Student will correct and revise all documents he/she produces. 5. Student will print all documents he/she produces. 6. Given a situation, the student will select an appropriate printing method. 7. Working in simulation groups, some students will input text, while others will proofread, correct, revise, and print documents.	1. Correctly identify standard proofreading marks. 2. List and demonstrate at least five (5) proofreading techniques. 3. use effective proofreading and revising techniques to produce mailable documents.

DOCUMENT PRODUCTION/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(4)** Identify and demonstrate concepts and skills related to effective communication and production of business documents.

LEARNING OBJECTIVE: Apply the general capabilities of information processing tools and software and read and discuss current literature related to business information processing.

GENERALIZATION: Information processing operators identify and operate the input elements and peripherals of computers.

CONTENT OUTLINE

I. REPROGRAPHIC TECHNOLOGIES

- A. Criteria for selecting reprographic methods
- B. Reprographic methods

II. STORAGE AND RETRIEVAL OF DOCUMENTS

- A. File management
- B. Storage media
- C. Optical disks
- D. Micrographic media
- E. Retrieval methods

III. DISTRIBUTION METHODS

- A. U.S. Postal Services
- B. Private courier
- C. Electronic methods
- D. Transmission systems
- E. Audio communication systems

LEARNING EXPERIENCE

1. After discussing reprographic methods, the student will list and briefly describe at least three types of reprographic methods.
2. The student will summarize one periodical article about reprographic methods.
3. The student will store and retrieve documents he/she inputs.
4. The student will discuss the importance of efficient file management.
5. After discussing storage methods, the student will list and briefly discuss at least three storage media.
6. The student will summarize one periodical article about storage media.
7. After discussing distribution methods, the student will list and briefly discuss at least three distribution methods.

EVALUATION CRITERIA

1. Identify reprographic methods, storage media, and distribution methods.
2. After inputting and saving documents, successfully retrieve files as directed by the teacher.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
	8. Given a situation, the student will select an appropriate distribution method and explain why it is best. 9. The student will summarize one periodical article about distribution methods.	

DOCUMENT PRODUCTION/RESOURCES

TEXT/WORKBOOKS

100 MULTI-ETHNIC TIMED WRITINGS: MAKING COURAGE COUNT
Forkner Publishing Co.

101 TYPEWRITING TIMED WRITINGS WITH SELECTED DRILLS
South-Western Publishing Co.

ACQUISITION OF TYPEWRITING SKILLS: METHODS AND RESEARCH IN TEACHING TYPEWRITING AND WORD PROCESSING
Bobbs-Merrill

ADVANCED COLLEGE TYPEWRITING
South-Western Publishing Co.

ADVANCED KEYBOARDING APPLICATIONS
Glencoe Publishing Co.

BASIC INFORMATION KEYBOARDING SKILLS
South-Western Publishing Co.

BASIC KEYBOARDING & TYPEWRITING APPLICATIONS
South-Western Publishing Co.

BASIC TYPEWRITING APPLICATIONS
South-Western Publishing Co.

BASIC TYPEWRITING DRILLS
South-Western Publishing Co.

BUSINESS LETTER TYPING
South-Western Publishing Co.

CENTERING, TABLES AND FORMS
South-Western Publishing Co.

CENTURY 21 KEYBOARDING, FORMATTING, AND DOCUMENT PROCESSING
South-Western Publishing Co.

CENTURY 21 TYPEWRITING: COMPLETE COURSE
South-Western Publishing Co.

COGNITIVE ASPECTS OF SKILLED TYPEWRITING
Springer-Verlag

COLLEGE TYPEWRITING
South-Western Publishing Co.

COLLEGE TYPEWRITING: A MASTERY APPROACH
Science Research Associates, Inc.

CONSULTAMATION, INC.
Gregg Division of McGraw-Hill, Inc.

GLENCOE KEYBOARDING
Glencoe Publishing Co.

GREGG TYPING FOR COLLEGES: COMPLETE COURSE
Gregg Division of McGraw-Hill Book Co.

HOUGHTON MIFFLIN KEYBOARDING AND APPLICATIONS
Houghton Mifflin Co.

HOUGHTON MIFFLIN TYPEWRITING: KEYBOARD MASTERY AND APPLICATIONS COMPLETE COURSE
Houghton Mifflin Co.

ISSUES RELATED TO KEYBOARDING
Data Base

KEYBOARDING: A NO-FAIL MODEL
Business Education Forum

KEYBOARDING FOR EVERYONE
Anaheim Book Co.

KEYBOARDING FOR INFORMATION PROCESSING
Gregg Division of McGraw-Hill, Inc.

KEYBOARDING FOR THE INFORMATION PROCESSOR
Glencoe Publishing Co.

KEYBOARDING IS FOR EVERYONE
Business Education Forum

KEYBOARDING SKILLBUILDER
Glencoe Publishing Co.

KEYBOARDING/TYPEWRITING
Glencoe Publishing Co.

KEYBOARDING/TYPEWRITING FOR PERSONAL APPLICATIONS
South-Western Publishing Co.

LABORATORY MATERIALS
South-Western Publishing Co.

LEARNING MICROCOMPUTER KEYBOARDING
The Balance Sheet

LEARNING TO KEYBOARD: MICRO-TUTORING VS./AND "LIVE" INSTRUCTION
Century 21

LETTERS AND MEMOS
South-Western Publishing Co.

MARKET SQUARE LEGAL CENTER: A LEGAL TYPING SIMULATION
Houghton Mifflin Co.

MERCURY SYSTEMS
Gregg Division of McGraw-Hill, Inc.

MICROCOMPUTER TYPEWRITING IN BUSINESS EDUCATION
Business Education Forum

MICROWORLD
South-Western Publishing Co.

MODERN COLLEGE TYPEWRITING: A COMPLETE COURSE
Harcourt Brace Jovanovich, Inc.

PALEMETTO INSURANCE COMPANY
South-Western Publishing Co.

PLEASURE ISLAND: A TYPEWRITING SIMULATION
Houghton Mifflin Co.

PROFESSIONAL AND PERSONAL KEYBOARDING AND TYPEWRITING
South-Western Publishing Co.

PROFESSIONAL AND PERSONAL TYPING
South-Western Publishing Co.

PROOFREADING PRECISION
South-Western Publishing Co.

REPORTS, MINUTES AND SCHEDULES
South-Western Publishing Co.

SIDEWALK SURFIN': A TYPEWRITING SIMULATION
Houghton Mifflin Co.

TEACHING KEYBOARDING TYPEWRITING
Delta Pi Epsilon

TEN-KEY TOUCH DRILLS
Glencoe Publishing Co.

TRIPLE-CONTROLLED TIMED WRITINGS
South-Western Publishing Co.

TYPE RIGHT!
Glencoe Publishing Co.

TYPEWRITING: A MASTERY APPROACH FOR IBM SELECTRIC TYPEWRITERS COMPREHENSIVE COURSE
Science Research Associates, Inc.

TYPEWRITING: LEARNING AND INSTRUCTION
South-Western Publishing Co.

TYPEWRITING SPEED/CONTROL BUILDERS
South-Western Publishing Co.

TYPING FROM ROUGH DRAFTS
MPC Educational Publishers

WORD PROCESSING APPLICATIONS IN PRACTICE
South-Western Publishing Co.

WORD PROCESSING CONCEPTS & APPLICATIONS
Gregg Division of McGraw-Hill, Inc.

PRACTICE SETS

AIR COUNTRY INTERNATIONAL TYPEWRITING PRACTICE SET
South-Western Publishing Co.

THE CASTAWAYS-A TYPEWRITING SIMULATION
South-Western Publishing Co.

ENCORE TALENT AGENCY-A TYPEWRITING SIMULATION
South-Western Publishing Co.

A GENERAL OFFICE ASSISTANT SIMULATION-SUNCOAST CIVIC CENTER
South-Western Publishing Co.

A GENERAL OFFICE ASSISTANT SIMULATION-TSR TOWERS, INC.
South-Western Publishing Co.

GYMNASTICS UNLIMITED-TYPEWRITING PRACTICE SET
South-Western Publishing Co.

JEANS GENERATION, INC.-A TYPEWRITING SIMULATION
South-Western Publishing Co.

KEYBOARDING/TYPEWRITING
Glencoe Publishing Co.

METROPLEX CLINIC: A MEDICAL TYPING SIMULATION
Houghton Mifflin Co.

MICROCOMPUTER OFFICE PRACTICE-TRONICS, INC.
South-Western Publishing Co.

TYPE RIGHT!
Glencoe Publishing Co.

TYPING FROM ROUGH DRAFTS
MPC Educational Publishers
John Wiley & Sons Co.

SOFTWARE

ALPHABETIC KEYBOARDING
Apple II, IIe, Franklin; 2 diskettes
South-Western Publishing Co.

GREGG KEYBOARDING FOR INFORMATION PROCESSING
Apple II, 3 diskettes
Gregg/McGraw-Hill and Control Data Corp.

GREGG TYPING, SERIES EIGHT, TIMED WRITINGS
Microcomputer: IBM PC or XT
Software Memory Requirements: 128k
Number of Drives Required: 2
Special Peripheral Equipment Needed: Printer (Optional), DOD 2.0 or higher
Gregg Division of McGraw-Hill Book Co.

HOUGHTON MIFFLIN TYPEWRITING DRILL AND PRACTICE SOFTWARE
Microcomputer: Apple IIc, IIe; IBM PC, XT
Tandy 1000
Software Memory Requirements: 128k
Number of Drives Required: 1
Special Peripheral Equipment Needed: 80-column printer
Houghton Mifflin Co.

HOUGHTON MIFFLIN TYPEWRITING TIMED WRITING SOFTWARE
Microcomputer: Apple IIc, IIe, IBM PC, XT
Tandy 1000
Software Memory Requirements: 128k
Number of Drives Required: 1 or 2
Special Peripheral Equipment Needed: 80-column parallel printer, Class Management Disk
Houghton Mifflin Co.

KEYBOARD MASTER
Apple II, IIe
Encyclopedia Britannica Educational Corp.
Software Center

KEYBOARDING FOR THE INFORMATION PROCESSOR
Microcomputer: Apple IIc, IIe, II+; IBM PC
Glencoe Publishing Co.

KEYBOARDING FOR THE PHYSICALLY HANDICAPPED
Microcomputer: Apple II+, IIe or IIc;
TRS-80 Model III or 4; IBM PC or PC jr.
Software Memory Requirements: 48k, 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer (Optional) DOS
Gregg Division of McGraw-Hill Book Co.

KEYSTROKES: KEYBOARDING FOR INFORMATION ENTRY
Microcomputer: Apple II, II+, IIc or IIe; IBM PC; TRS-80 Model III or 4
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Houghton Mifflin Co.

MASTER TYPE
Microcomputer: Apple, Commodore 64, IBM PC
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

MICROCOMPUTER KEYBOARDING
Apple II, IIe, Franklin; 4 diskettes
South-Western Publishing Co.

PACING SOFTWARE FOR PROGRESSIVE TYPEWRITING SPEED PRACTICE
Microcomputer: IBM PC or XT
Software Memory Requirements: 128k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Gregg Division of McGraw-Hill Book Co.

SMARTYPE-A KEYBOARDING PROGRAM
Microcomputer: Apple II Plus
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer (Optional), Language Card
Gregg Division of McGraw-Hill Book Co.

SUPERKEY
Microcomputer: Apple, Apple Classpack
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPE!
Microcomputer: Apple, C64, IBM
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPING IS A BALL, CHARLIE BROWN
Microcomputer: Apple, Commodore
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

TYPING TUTOR III
Microcomputer: Apple, Commodore 64, IBM PC
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None
Scholastic Produced Software & Books

DOCUMENT PRODUCTION/UNIT OVERVIEW

I. TERMINOLOGY

A. *ADMINISTRATIVE SUPPORT*: all the nontyping tasks associated with traditional secretarial work carried out under administrative supervision.

B. *BOILER PLATE*: a number of standard paragraphs that can be arranged in a specified order as needed; the stored paragraphs.

C. *CATHODE RAY TUBE (CRT)*: a screen that makes it possible to produce a document in the document cycle without the use of paper.

D. *COMPUTER INPUT MICROFILM*: microfilm that is used as input to the computer.

E. *CLUSTER*: a work group.

F. *COMPUTER AIDED TRANSCRIPTION*: transcription of shorthand notes recorded on magnetic tape, completed automatically in a computer .

G. *CORRESPONDENCE CENTER*: the location where the word processing personnel perform typing activities. Also called word processing center.

H. *FACSIMILE*: a type of copier that electronically sends an original document from one location to a remote location where it is reproduced as a copy of the original document.

I. *FLOPPY DISK*: a type of magnetic media that stores information.

J. *FORM LETTER*: the same letter to be sent to a number of different people, usually prepared in advance and duplicated.

K. *HARD COPY*: a rigid magnetic storage medium with a capacity to store large amounts of text.

L. *IMPACT PRINTERS*: a printer that strikes type against a ribbon and paper.

M. *INPUT*: what the system works with--the source of information or getting information into an information processing system, primarily by keyboarding.

N. *MAGNETIC CARD*: a plastic-like card (oxide-coated Mylar film) on which information may be stored.

O. *MAGNETIC MEDIA*: media that records dictation or keystrokes by means of electric impulses and magnetism.

P. *MAGNETIC TAPE*: tape coated with magnetic material on which information may be recorded and stored.

Q. *MASTER*: the original copy from which duplicates are made.

R. *MICROGRAPHIC MEDIA*: microfilm used for filing information in the form of miniaturized images.

S. *NON-IMPACT PRINTER*: a printer that shapes characters usually through the use of light or a spray of ink and is therefore noiseless.

T. *OPTICAL CHARACTER RECOGNITION*: a device that reads the printed characters on typed pages and stores them for the information processor.

U. *OPTICAL (LASER) DISK*: a recordlike device on which information is stored by the use of light in the form of laser beams to write and read data.

V. *ORIGINATION*: the process of converting raw facts and data into usable ideas and information, usually handwritten or dictated to a support person or a dictating machine.

W. *ORIGINATOR*: the person who changes raw facts and data into useful information.

X. *OUTPUT*: what the system produces--the final product or end result; the final printing of information after it has been keyboarded, stored, and edited; hard copy (paper).

Y. *PHOTOCOPY MACHINE*: information processing equipment that produces photocopies of a document.

Z. *PLOTTER*: a device that produces straight, curved, possibly continuous, or three-dimensional images.

AA. *PRINCIPAL*: a person who origintes paperwork; a person who dictates "copy" for transcription into final document.

BB. *RANDOM ACCESS*: a method of storage in memory or on external media in which the information is in no specific order.

CC. *REPROGRAPHICS*: image processing that reproduces a document or record after it has been prepared on information processing equipment.

DD. *SATELLITE*: a work group composed of processing specialists, administrative support secretaries, or both.

EE. *SEQUENTIAL*: a method of storage on external media in which information is stored one item after another and must be read in sequence.

FF. *SHARED LOGIC*: terminals that share computing power of a mainframe and use common data bases.

GG. *TERMINAL*: any device (such as communicating text-editor) capable of sending or receiving information over a communications channel.

HH. *TRANSCRIBE*: to produce a typed document from recorded dictation.

II. *VOICE PROCESSING*: the processing of information in the form of spoken words.

JJ. *WINCHESTER DISK*: the type of rigid disk most often used with word processing and microcomputer systems.

KK. *WORD PROCESSING CENTER*: the room or designated area with equipment and personnel for processing written communication.

LL. *WORD PROCESSING SYSTEM*: the combination of specific procedures, methods, equipment, and people designed to perform and improve the input, output, and distribution of written communication.

MM. *WORK STATION*: a work area for one person.

II. ORIGINATION IS THE PROCESS OF GENERATING INFORMATION

A. The person who originates documents is called the *originator*, principal, or author.

B. The person who converts the original ideas to a typewritten document is called the *transcriptionist*.

C. *Longhand* and *dictation* are the two methods of origination.

1. Longhand is still the most common method.

    a. Advantages of longhand include:
        (1) No special skill needed
        (2) Requires only one person
        (3) Requires no special equipment

    b. Disadvantages of longhand include:
        (1) It is the slowest method, approximately 10 to 15 words per minute.
        (2) Longhand requires transcribing written notes, which may be more or less legible.

2. Dictation may be either shorthand or machine.

    a. Dictation to a stenographer is faster, approximately 80 to 120 words per minute.
        (1) Dictatation requires skill of the stenographer and transcription of notes.
        (2) Stenographer and dictator must be present.
    b. Shorthand machines reach speeds up to 250 wpm and computer-aided transcription facilitates electronic transcription of data.
    c. Machine dictation is the most popular dictation method.
        (1) It requires only the dictator and equipment present at time of dictation.
        (2) The transcriptionist must have good language skills, as well as keyboarding skills.
        (3) Equipment may be portable, desk-top, or centralized.
    d. Voice processing, which converts human voice to electronic data, is still in the developmental stages.

III. PROCESSING - creating, editing, formatting, and printing information

A. The *keyboard* is the most popular method of input.

1. The alphanumeric keyboard of a computer is similar to that of a typewriter.

2. Computer keyboards also have function keys:

    a. Formatting keys set line length, tabs, top and bottom margins, line pitch and spacing, and justified margins.
    b. Locating keys control the movement of the cursor.
    c. Editing keys assist in making revisions, such as insert or delete.
    d. Dual function or CODE keys increase the capability of the keyboard.
    e. Command keys give instructions to the system.

    f. The operation of the function keys is dependent upon the software and usually changes from package to package.

B. *Other methods* of input include:

  1. OCR - optical character recognition reader

  2. CIM - computer input from microfilm

  3. Voice processing

  4. Computer aided transcription

C. *Processing* involves seven steps:

  1. Open a new file

  2. Determine style and set format

  3. Input text, making corrections as identified

  4. Proofread on the screen

  5. Use spell check function, if available

  6. Save and name the document

  7. Output the document; printer is most common method

D. *Proofread* and edit the document

  1. Use standard proofreading marks

  2. Use reference manuals to verify text

    a. Dictionary
    b. Word division manual
    c. Secretarial reference manual
    d. Company procedures manual
    e. Telephone and ZIP Code directory

  3. Use a variety of proofreading techniques:

    a. Read entire document, checking/placement, format, content, and neatness of document.
    b. Check each line for spelling, typographical, word division, punctuation, and grammar errors.
    c. Double-check figures, technical terms, and proper names character by character.
    d. Work with a partner who reads the original aloud.
    e. Use a ruler or pencil as a guide to mark your place.
    f. Check with the originator if you have questions.

  4. Return document to the originator for revisions and/or approval

E. *Correct* errors and revise as needed

F. *Print* the final draft

1. Printing devices include:
   a. Impact printers:
      (1) Daisy wheel
      (2) Thimble
      (3) Dot matrix
      (4) Line printers
   b. Nonimpact printers:
      (1) Ink-jet
      (2) Thermal transfer
      (3) Laser
   c. Plotters for graphics

2. Supplemental devices include:
   a. Tractor feeders
   b. Sheet feeders
   c. Envelope feeders
   d. Burster
   e. Collators
   f. Shredders

IV. **REPROGRAPHICS** - include a variety of technologies to reproduce the desired number of copies of documents

A. *Criteria* for selecting reprographic methods include:

1. What is a reasonable cost in relation to the purpose?

2. What quality of the copy is needed?

3. How many copies are needed?

4. How much time is involved?

B. *Methods* for reproducing documents include:

1. Repetitive printing

2. Carbon copies, NCR or carbon packs

3. Duplicating machines, such as spirit, mimeograph, or offset printing

4. Photocopy machines

5. Facsimile machines which electronically send data to another location

6. Electronic copier/printer (intelligent printers) can accept data from word or data processing equipment.

7. Phototypesetting allows adjustments in layout and type size/style.

V. **STORAGE AND RETRIEVAL** - an important part of information processing

A. Efficient *file management* facilitates information retrieval and file integrity.

1. An organized system of naming documents should be developed and used within the word processing center.

2. Reference initials and document identification should be included on every document.

3. A backup copy of important documents should be made.

4. Outdated documents should be purged from the system at regular intervals.

B. *Storage* media include:

1. Hard copy (paper)

2. Magnetic media:

   a. Magnetic cards known as mag cards
   b. Magnetic tape, cassette or reel to reel
   c. Floppy diskettes: 8, 5 1/4, and 3 1/2 inch
   d. Winchester disk
   e. Hard disks

3. Optical (laser) disks

4. Micrographic media:

   a. Microfilm
   b. Microfilm jackets
   c. Aperture cards
   d. Microfiche
   e. Ultrafiche

C. *Storage* and *retrieval* methods include:

1. Sequential

2. Random access

VI. **DISTRIBUTION** - getting documents to intended parties

A. *Delivery* methods include:

1. U.S. Postal system

2. Private courier services

B. Documents sent by *signal* include:

1. Facsimile

2. Telex or TWX

3. Mailgram

4. Communicating word processors (intelligent printers)

5. Electronic mail

6. Local Area Network systems (LAN)

C. *Transmission* systems include:

1. Telephone lines with use of modems for interface

2. Fiber optics allows transmission of laser beam through glass fibers.

3. Microwaves transmit data by means of high-frequency radio waves.

4. Satellite relay stations reflect radio signals to remote locations for transmission of voice, text, graphics, and video communications.

D. *Audio* communication systems include:

1. Conventional telephone systems

2. Teleconferencing

3. Voice mail

DOCUMENT PRODUCTION/ACTIVITY ONE

Accurate keyboarding and good language skills are very important for information processing operators. Attention to details and careful proofreading are equally important.

DIRECTIONS: Input the letter below using modified block style on a 5 inch line. Type the date on line 7, the inside address four (4) blank lines below the date, single space the body, double space before the complimentary closing, and three (3) blank lines before the signature line. Be sure to include your reference initials and the enclosure notation. Use the spell check function (if available), proofread, and correct errors to produce a mailable document.

March 15, 19__/Ms. Susan Blake / 6893 South Potranco Blvd. / Austin, TX 78706 / Dear Susan: Your up-coming graduation marks a milestone in your life, and continuing your education will be a wise investment in your future. You have probably already started exploring sources for financing your education. You may find that sources such as grants, scholarships, and work study are not enough to cover all costs. This is where Barton Educational Services can assist you.

We have many years of experience in helping students work through the process of selecting just the right education financing options. In addition, we can provide flexible repayment plans suited to your specific needs. This assistance could mak a college education a reality for you--no matter what your current financial situation.

Susan, if higher education is your next step, take a look at Barton's financing options outiined on the enclosed information sheet. To receive more information, simply complete and return the enclosed request form. Or you may call us on our toll-free hotline, 1-800-555-LOAN

Congratulations on your graduation, and we wish you much success in the future. / Sincerely yours, / Charles Brooks / Director, Educational Services / ref / Enclosure

DOCUMENT PRODUCTION/ACTIVITY TWO

DIRECTIONS: One of the greatest advantages to using word processing equipment, is the ability to revise documents without having to retype them. Using editing functions, such as insert, delete, block, move, search and replace and others, makes document revision easy and quick. Using the **instructions below**, make the following changes in the letter typed in Activity One.

1. Change the line length to 6 inches.
2. Change the style from modified block to full block.
3. Change the date to March 30 and put it on line 12
4. Address the letter to:

   Ms. Lisa Garcia
   1604 Flora Avenue
   San Antonio, TX 78266

5. Use the search and replace function to change Susan to Lisa.
6. Adjust the right margin using the hyphenation function.
7. Proofread and correct to produce a mailable document.

DOCUMENT PRODUCTION/ACTIVITY THREE

Origination is the process of generating information in response to an identified need. Facts and raw data are organized into written form that expresses an idea. The resulting document provides details used for making decisions or communicating.

DIRECTIONS: Using the information given in the situation below, compose, format, and input a personal business letter. Word process the letter on plain paper, using any acceptable format. Proofread your letter and correct any errors to produce a mailable document.

You will be graduating in one month, and you are actively looking for full-time employment as a clerical worker. Apply for the job listed below which appeared in a classified advertisement in your local newspaper. The first paragraph of your letter of application should state the purpose of your letter, the job for which you are applying, and where you learned about the job. In the second paragraph tell about your special qualifications* for the job. The last paragraph should state your interest in an interview for this job and where the employer can reach you. If you have a copy of your resume you have developed in the past, enclose it with your letter.

*Assume you are qualified for this job. If you are not, make up appropriate details.

HELP WANTED

RECEPTIONIST for busy insurance office. Excellent telephone and word processing skills required; typing 45 - 50 wpm; shorthand not required, but a definite plus. Send resume to Samuel Rodriguez, 5221 First St., San Antonio, TX 78224.

1. Compose and keyboard a three page, double spaced, report describing the document production cycle. Include an explanation of each step in the cycle and relate it to a realistic office situation.

2. Use the following instructions to input the letter below:

   A. Set margins for a 5 inch line.

   B. Use modified block style.

   C. Type the date on line 15.

   D. Use the hyphenation function to adjust the right margin.

February 8, 19__ / Ms. Florence Taylor / 4405 Frecrest Road/ Houston, TX 77034 / Dear Ms. Taylor: / Enclosed is the information you requested concerning our photocopy machine, Model 333.

I am so pleased you saw the demonstration of our products at the Electronic Trade Fair, which was recently held at the Hilton Hotel. If you have additional questions, do not hesitate to call me at (713) 555-8821. / Sincerely yours, / Janet Hale / Sales Representative / ref / Enclosure

DOCUMENT PRODUCTION/ANSWER SHEET

All activities and test will be evaluated by Mailability Criteria.

MAILABILITY CRITERIA FOR WORD PROCESSING

Documents will be accepted only in the style and format described in the directions. Credit can be given for partially completed problems. The criteria for evaluating daily work and production tests include three levels of mailability: M+, M, and M-.

I. **M+ -- MAILABLE, PERFECT**

   A. All instructions were correctly followed.

   B. Contains no uncorrected errors, misspellings, typographical errors, incorrect punctuation, incorrect capitalization, or incorrect word divisions.

   C. Contains no omissions in the document.

   D. Neatly completed with good placement of document on the page.

II. **M -- MAILABLE**

   A. All instructions were correctly followed.

   B. Contains no uncorrected errors, misspellings, typographical errors, incorrect punctuation, incorrect capitalization, or incorrect word divisions.

   C. Less than ideal placement or spacing of the document on the page.

   D. Omission of enclosure notation or reference initials.

   E. Acceptable but undesirable division of words.

   F. Acceptable but not most desirable use of capitalizaiton or punctuation.

III. **M- -- NOT MAILABLE**

   A. Instructions were not followed.

   B. Uncorrected typographical errors.

   C. Misspelled words.

   D. Essential punctuation or capitalization violation.

   E. Basic grammar violations.

   F. Omission or addition of word or words.

   G. Total incorrect placement or spacing of the document on the page.

   H. Omission of a part of the document, i.e., date, inside address, side headings, etc.

DOCUMENT PRODUCTION/ANSWER SHEET

ACTIVITY ONE

March 15, 1988

Ms. Susan Blake
6893 South Potranco Blvd.
Austin, TX 78706

Dear Susan:

Your up-coming graduation marks a milestone in your life, and continuing your education will be a wise investment in your future. You have probably already started exploring sources for financing your education. You may find that sources such as grants, scholarships, and work study are not enough to cover all costs. This is where Barton Educational Services can assist you.

We have many years of experience in helping students work through the process of selecting just the right education financing options. In addition, we can provide flexible repayment plans suited to your specific needs. This assistance could make a college education a reality for you--no matter what your current financial situation.

Susan, if higher education is your next step, take a look at Barton's financing options outlined on the enclosed information sheet. To receive more information, simply complete and return the enclosed request form. Or you may call us on our toll-free hotline, 1-800-555-LOAN.

Congratulations on your graduation, and we wish you much success in the future.

Sincerely yours,

Charles Brooks
Director, Educational Services

ref
Enclosure

DOCUMENT PRODUCTION/ANSWER SHEET

ACTIVITY TWO

March 30, 1988

Ms. Lisa Garcia
1604 Flora Avenue
San Antonio, TX 78266

Dear Lisa:

Your up-coming graduation marks a milestone in your life, and continuing your education will be a wise investment in your future. You have probably already started exploring sources for financing your education. You may find that sources such as grants, scholarships, and work study are not enough to cover all costs. This is where Barton Educational Services can assist you.

We have many years of experience in helping students work through the process of selecting just the right education financing options. In addition, we can provide flexible repayment plans suited to your specific needs. This assistance could make a college education a reality for you--no matter what your current financial situation.

Lisa, if higher education is your next step, take a look at Barton's financing options outlined on the enclosed information sheet. To receive more information, simply complete and return the enclosed request form. Or you may call us on our toll-free hotline, 1-800-555-LOAN

Congratulations on your graduation, and we wish you much success in the future.

Sincerely yours,

Charles Brooks
Director, Educational Services

ref
Enclosure

ACTIVITY THREE

Evaluated to the satisfaction of the instructor.

DOCUMENT PRODUCTION/UNIT TEST

To be evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(2)(A)

The student will be provided opportunities to: identify procedures for controlling manual records by applying terminology and procedures for indexing, coding, and filing alphabetically.

OBJECTIVE: Define records management terminology and demonstrate indexing procedures.	MASTERY	NON MASTERY
1. Identify ARMA rules.	_____	_____
2. Define filing terminology.	_____	_____
3. Demonstrate knowledge of ARMA rules.	_____	_____
4. Identify steps in transfer of files.	_____	_____
5. Demonstrate filing rules by completing a filing practice set or work.	_____	_____
	_____	_____
	_____	_____

STUDENT NAME ______________________________

RECORDS MANAGEMENT/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(A)** Acquire the concepts and skills related to business records management and demonstrate those concepts and skills.

LEARNING OBJECTIVE: Identify procedures for controlling manual records by applying terminology and procedures for indexing, coding, and filing using the alphabetic system.

GENERALIZATION: The automated office has continued the need for "paper records management" or hard-copy filing.

CONTENT OUTLINE

I. BASIC FILING TERMINOLOGY

II. BASIC FILING RULES BY ARMA

- A. Names of individuals
- B. Names of business establishments
- C. Governmental and political designations
- D. Miscellaneous rules
- E. Guidelines for consistency in alphabetic filing

III. ALPHABETIC CARD FILING

LEARNING EXPERIENCE

1. View terminology and procedures used in manual filing on overhead projector and discuss them.
2. Discuss and learn the ARMA rules used in all filing methods.
3. Complete practice activities in the following:
   - a. Indexing and coding alphabetically--cards
   - b. Indexing and coding alphabetically--correspondence
   - c. Cross referencing correspondence
   - d. Storing and retrieving correspondence
   - e. Discuss transfer of files
4. Complete a simulated practice set in alphabetic filing.

EVALUATION CRITERIA

1. Complete a test covering the following:
   - a. Identify ARMA rules
   - b. Define filing terminology
2. Demonstrate indexing procedures.
3. Identify steps in transfer of files.
4. Demonstrate knowledge of filing rules and procedures by completing a filing simulation practice set.

RECORDS MANAGEMENT/CURRICULUM OUTLINE (Continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
IV. ALPHABETIC CORRESPONDENCE FILING A. Basic written correspondence B. Steps applicable to correspondence	5. Tour a company's records management center. 6. Hear a guest speaker from a records management department. 7. Read summaries of articles from business publications and company publications.	
V. CONTROLLING FILES A. Transferring files B. Policy governing how long to maintain records C. Transfer plans D. Steps in planning transfer of files	8. View transparencies on: a. Steps of filing b. Indexing c. Coding d. Alphabetic file drawer e. Filing equipment/supplies f. Guidelines for finding missing files g. Do's and Dont's of filing	
VI. GUIDELINES FOR MISFILED REPORTS A. Locating the record B. Eliminating loss of record		

RECORDS MANAGEMENT/RESOURCES

TEXT/WORKBOOKS

ALPHABETIC INDEXING
South-Western Publishing Co.

ALPHABETIC INDEXING
15-20 class hours, text, workbook
South-Western Publishing Co.

APPLIED SECRETARIAL PROCEDURES
Gregg Division/McGraw-Hill Book Co.

ARMA FILING RULES
Twin Oaks Publishing, Inc.

BUSINESS COMPUTER SYSTEMS
Mitchell Publishing, Inc.

BUSINESS FILING AND RECORDS CONTROL
South-Western Publishing Co.

BUSINESS RECORDS CONTROL
South-Western Publishing Co.

FILING MADE EASY
Houghton Mifflin

FILING PROCEDURES
MPC Educational Publishers
(Milady Publishing Co.)

GENERAL OFFICE PROCEDURES
South-Western Publishing Company

INTENSIVE OFFICE SKILLS REVIEW
South-Western Publishing Company

OFFICE FILING PROCEDURES
South-Western Publishing Co.

OFFICE PROCEDURES
Gregg Division/McGraw-Hill Book Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin

PROGRESSIVE FILING
Gregg/McGraw-Hill Book Co.

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

PRACTICE SETS

ALPHABETIC FILING PROCEDURES
South-Western Publishing Co.

ALPHABETIC INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES
an audiovisual
Occupational Curriculum Laboratory
East Texas State University

ALPHABETIC INDEXING RULES
Forsegan

EDL FILING COURSE FILMSTRIPS
Gregg/McGraw-Hill Book Co.

FILING MADE EASY, A FILING SIMULATION
Houghton Mifflin Publishing Co.

FILING PRACTICE WORKBOOK
Glenn Publishing Co.

FILING PROCEDURES
audiovisual slides
MPC Educational Publishers
(Milady Publishing Co.)

FILING SKILLS
film, program guide, masters
Prentice Hall Publishing Co.

GREGG QUICK FILING TRANSPARENCIES
Gregg Division/McGraw-Hill Book Co.

GREGG QUICK FILING PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

OJT FILE CLERK
South-Western Publishing Co.

PROGRESSIVE FILING
Gregg Division/McGraw-Hill Book Co.

QUICK FILING PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

WORKBOOK EXERCISES IN ALPHABETIC FILING
Gregg/McGraw-Hill Book Co.

SOFTWARE

ALPHABETIC INDEXING RULES
1 disk, workbook, and teacher's manual
Apple II, IIe, or IIc
TRS-80 Model III or IV
IBM-PC
Career Aids, Inc.

ALPHABETIC INDEXING RULES APPLICATION BY COMPUTER
text, workbook, diskette for:
TRS-80 Model III and IV
TRS-80 network III
Apple II Plus and Apple IIc
IBM-PC
Tandy 1000
South-Western Publishing Co.

APPLEWORKS
Apple Computer

DATA HANDLER
MECC Publications

DBASE II
Ashton-Tate

FILE CLERK
Micro-computer Job Simulator Series
TRS-80 Model III
Career Aids, Inc.

INFO STAR
MicroPro International Corp.

LIST HANDLER
Silicon Valley Systems

LOTUS 1-2-3
Lotus Development Corp.

PFS FILE
Software Publishing Corp.

QUICK FILE II
Apple Computer

RECORDS MANAGEMENT/UNIT OVERVIEW

I. TERMINOLOGY

A. *Active file*: file that is used frequently.

B. *Alphabetizing*: putting names in order according to the letters of the alphabet.

C. *ARMA*: Association of Records Managers and Administrators, Inc.

D. *Caption*: written, typed, or printed heading on the tabs of guides.

E. *Charge-Out*: a check-out system used for removing materials from a file.

F. *Chronological order*: filing so that the most currently dated correspondence is on top of the filed stack.

G. *Coding*: marking units in a filing segment.

H. *Correspondence*: written communication between a company and its branches, with other businesses, and individuals in the form of letters, memorandums, telegrams, invoices, purchase orders, and other papers sent or received by a company.

I. *Cross referencing*: preparing a card or form showing the alternate location of a piece of correspondence.

J. *Disposition*: the destroying of records that are no longer needed.

K. *Filing*: the systematic arrangement and storage of materials for easy storage and retrieval.

L. *Follow-up*: a method of tracing or locating papers not returned to the file on time.

M. *Geographic filing*: filing by geographic location.

N. *Identifying elements*: not a unit for filing purposes, but used to determine correct filing sequence.

O. *Inactive files*: records not subject to frequent use, stored in less accessible places.

P. *Incoming correspondence*: all correspondence that originates outside the office.

Q. *Indexing*: the arrangement of the units of a name for correct alphabetizing order.

R. *Individual folders*: contain correspondence to, from, or about an individual or company. Material is filed alphabetically; current date on top.

S. *Inspecting*: checking for initials or other indications that material is released for storing.

T. *Key unit*: the unit under which a name will be filed.

U. *Married woman's legal name*: consists of (1) her first name; (2) her middle name or maiden name; (3) her husband's surname.

V. *Microforms*: the formats of microfilm storage, such as microfiche and microfilm.

W. *Micrographics*: a total information system including filming, filing, and retrieval of information.

X. *Miscellaneous folder*: contains correspondence for which there is no individual folder. Material is filed alphabetically, then the date, current date on top.

Y. *Numeric filing*: filing by number rather than by alphabetic letter.

Z. *Outgoing correspondence*: correspondence that originates within an office.

AA. *Periodic transfer*: a method of removing papers from the active to the inactive files at stated intervals of time.

BB. *Perpetual transfer*: a continuous process of removing records from the active to the inactive file.

CC. *Primary guides*: guides that are placed before other materials to show the major alphabetic divisions in a file.

DD. *Records manual*: an office-business publication giving guidelines for maintaining records of that company.

EE. *Records Management*: the system used to make storing (filing) records a reliable and systematic process.

FF. *Release mark*: the initials of the person who originally received a piece of correspondence.

GG. *Retrieval*: locating materials which have been stored in the files.

HH. *Sorting*: arranging correspondence according to predetermined alphabetic breakdown.

II. *Store*: placing (or filing of) materials in a file according to the alphabetic, date, number, or subject.

JJ. *Subject filing*: filing correspondence alphabetically by content subject.

KK. *Units*: segment of a name used in determining the alphabetic order.

II. BASIC FILING RULES BY ARMA ARE USED AS THE BASIS OF RECORDS MANAGEMENT

(These may be purchased from the Association of Records Managers and Administrators, Inc. or may be found in the OEA Competitive Guidelines.)

A. *Names of individuals*

1. Simple personal names
2. Personal names with prefixes

3. Personal names with personal and professional titles and suffixes
4. Personal names which are hyphenated
5. Pseudonyms, royal, and religious titles
6. Foreign personal names
7. Nicknames

B. *Names of business establishments*

1. Filed as written on letterhead.
2. Business subsidiaries filed under own name with a cross-reference to parent company if needed.
3. Place names (geographic locations) follow the standard rule that each word/filing unit is treated as a separate filing unit.
4. Compass points used in a business name considered as separate filing units.
5. Numeric numbers used at the beginning of a business name considered in ascending numeric order.

C. *Governmental and political designations*

1. Major unit (such as U. S. Government, State of Texas, etc.) filed first, followed by distinctive name of department/bureau.
2. Distinctive English name is the first filing unit in a foreign government.

D. *Miscellaneous rules*

1. Churches and organizations
2. Schools and universities
3. Newspapers and publications
4. Hotels and motels

E. *Consistency in alphabetic filing*

1. Arrange files unit-by-unit and letter-by-letter within each unit.
2. "Nothing before something" -- a name by itself before the same name with another unit.
3. Punctuation ignored when alphabetizing and hyphenated words considered one unit.
4. Prepositions, conjunctions, and articles (except at the beginning of a name) considered as filing units.
5. Arabic numerals filed before Roman numerals; both precede alphabetic characters (both filed from lowest to highest).
6. Always file under most commonly used name or title.
7. Cross reference names or titles which might cause problems in retrieval.

III. ALPHABETIC CARD FILING

A. Apply basic filing rules using *index cards*

B. Steps in card filing

1. *Code* the name
2. *Index* the name
3. *Alphabetize* by unit

IV. ALPHABETIC CORRESPONDENCE FILING

A. Basic *written* correspondence

1. Letters
2. Memos
3. Reports
4. Purchase orders and invoices
5. Telegrams

B. *Steps* in correspondence filing

1. Inspect for *release mark*

2. *Index*

   a. Incoming correspondence by letterhead
   b. Outgoing correspondence by inside address (usually)

3. *Code* the correspondence

   a. Mark units
   b. Cross reference

4. Sort correspondence by *alphabet*

5. *Store* correspondence

   a. Types of folders

      (1) Individual (all correspondence to, from, or about one person/company)
      (2) Miscellaneous (correspondence from a number of individuals/companies)

   b. Sequence of correspondence within folder

      (1) Alphabetic (by alphabetic letter)
      (2) Chronological (by date, current date on top)

6. *Retrieve* correspondence

    a. Charge-out methods

        (1) Record name of person removing file
        (2) Date file removed
        (3) Proposed date of file return

    b. Follow-up methods

        (1) Tracing of files removed
        (2) Equipment used to follow up file

            (a) Card system
            (b) Follow up folders

V. CONTROLLING FILES

A. *Transferring files*

1. *Active files*

    a. Records used frequently
    b. Accessible for use

2. *Inactive files*

    a. Records seldom used
    b. Stored away from office area

B. *Policy governing how long to maintain records*

1. *Vital records*

    a. Necessary to operation of business
    b. Irreplaceable if destroyed
    c. Should never be transferred

2. *Important records*

    a. Facilitate the operation of business
    b. Can be replaced at great cost if destroyed
    c. Transferred to inactive files if kept in good condition

3. *Useful records*

    a. Temporarily helpful in operation of business
    b. Can be replaced at slight cost if destroyed
    c. Destroyed after three or four years

4. *Nonessential records*

    a. Temporarily useful in operation of business

b. Destroyed after temporary use

C. *Transfer plans*

1. *Periodic transfer*

a. Removal of records at stated intervals

(1) One-period plan (transferred at stated intervals)
(2) Two-period plan (transferred twice a year)
(3) Maximum-minimum period plan (transferred when folder exceeds 75-100 pieces of paper)

b. Removal of all equipment to inactive storage (new folders set up)

2. *Perpetual transfer*

a. Transfer from active to inactive files continuously
b. Used by businesses who have difficulty setting definite periods for transfer

(1) Contractors and architects
(2) Lawyers

D. *Steps to transfer files*

1. *Prepare list* of correspondents who will need new folders

2. *Type labels* for new folders

3. *Assemble transfer box* for storage of records

4. *Destroy* previously transferred records, if

a. No longer needed
b. Authority to destroy in writing

VI. GUIDELINES FOR MISFILED RECORDS

A. *Locating* the record

1. Check to see if out of order in file

2. Check "to be filed" tray

3. Check folders directly in front and back of the folder in which record should be found

4. Check space in front of, behind, and under file folder

5. Check names/folders with similar spelling or sound

6. Check other indexing units of record

7. Check under names of related names/subjects

8. Check every possible arrangement of figures in numeric filing

B. *Eliminating loss of record*

1. Stand to side of file drawer when filing -- eliminates having to reach too far
2. Have proper lighting in filing area
3. Pull up folder in which record is to be stored
4. NEVER use paper clips
5. Return folders IMMEDIATELY to file drawer after using

INDEXING EXERCISE -- INDIVIDUAL NAMES

DIRECTIONS: Using 3-by-5 inch cards, prepare the following names to be indexed. After typing the cards, put them in alphabetical order; then type the caption from each card in correct alphabetical order on the attached answer sheet.

1. John Henry Brown
2. S. Browning Martinez
3. Brown
4. Mrs. William Marcus Brock (Sandra Bennett)
5. Mrs. J. C. Brockman (Roma Jean)
6. Paul H. Bronman
7. Susan St. James
8. Lynda De la Rosa
9. Charles Adamly
10. Tran Cahn
11. Doris Burk; 1808 Stanley;Austin, TX 78745
12. Paul H. Looney, III
13. Sister Beatrice
14. Jimmy Belton
15. Elizabeth Aston-Sullivan
16. Carol O'Sullivan
17. Doris Burk; 9501 Ramblewood; Austin, TX 78745
18. L. C. Anderson
19. Jefferson Brownley
20. Paul H. Looney, Sr.

INDEXING EXERCISE--INDIVIDUAL NAMES/ANSWER SHEET

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

6. ______________________________

7. ______________________________

8. ______________________________

9. ______________________________

10. ______________________________

11. ______________________________

12. ______________________________

13. ______________________________

14. ______________________________

15. ______________________________

16. ______________________________

17. ______________________________

18. ______________________________

19. ______________________________

20. ______________________________

INDEXING EXERCISE -- BUSINESS NAMES

DIRECTIONS: Using 3-by-5 inch index cards, prepare the following names to be indexed. After typing the cards, put them in alphabetical order; then type the caption from each card in correct alphabetical order on the attached answer sheet.

1. Tracor, Inc.
2. Tres Amigos Restaurant
3. Southwestern Airlines
4. Texas Commerce Bank--Northcross
5. ABC Florist
6. First Baptist Church
7. South-Western Publishing Co.
8. Woodmen of the World
9. Texas Commerce--Barton Creek
10. New York Journal--Dallas
11. Deanie Owens Realtors
12. The In Town Inn
13. 6th Street Cafe
14. Castro and Caudill Realtors
15. Owens-Baker Auto Supply
16. Willie Kocurek Elementary School
17. San Antonio Power and Light
18. New York Journal--New York
19. Utilities Department of Austin
20. Mrs. Johnson's Bakery
21. Motel 6
22. Internal Revenue Service
23. KVET Radio Station

INDEXING EXERCISE--BUSINESS NAMES/ANSWER SHEET

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

6. ______________________________

7. ______________________________

8. ______________________________

9. ______________________________

10. ______________________________

11. ______________________________

12. ______________________________

13. ______________________________

14. ______________________________

15. ______________________________

16. ______________________________

17. ______________________________

18. ______________________________

19. ______________________________

20. ______________________________

21. ______________________________

22. ______________________________

23. ______________________________

RECORDS MANAGEMENT/UNIT TEST-TERMINOLOGY

DIRECTIONS: Match the following terms with the definitions listed below. Write the term number in the space to the left of the definition.

1. Filing
2. Coding
3. Indexing
4. Inspecting
5. Micrographics
6. ARMA
7. Incoming Correspondence
8. Store
9. Primary Guides
10. Charge Out
11. Periodic Transfer
12. Married Woman's Legal Name

DEFINITIONS:

A_____ Association of Records Managers & Administrators, Inc.
B_____ Systematic arrangement and storage of materials.
C_____ Placing material in a file according to alphabet.
D_____ Her first name; middle name; husband's surname.
E_____ Marking caption on correspondence.
F_____ Guides placed to show major divisions in a file.
G_____ Total informations system including filing, filming, retrieval.
H_____ Correspondence originating outside the office.
I_____ Removal of papers from active to inactive file at stated intervals.
J_____ Check out system for removing materials from a file.
K_____ Checking for initials releasing material for filing.
L_____ Arrangement of units for correct alphabetizing order.

RECORDS MANAGEMENT/ANSWER SHEET/ACTIVITY ONE

1. Charles Adamly (#9)
2. L. C. Anderson (#18)
3. Elizabeth Aston-Sullivan (#15)
4. Jimmy Belton (#14)
5. (Mrs.) Sandra Bennett Brock (William Marcus) (#4)
6. (Mrs.) Roma Jean Brockman (J. C.) (#5)
7. Paul H. Bronman (#6)
8. Brown (#3)
9. John Henry Brown (#1)
10. Jefferson Brownley (#19)
11. Doris Burk (#11)
    9501 Ramblewood, Austin, TX 78745
12. Doris Burk (#11)
    1808 Stanley, Austin, TX 78745
13. Tran Cahn (#10)
14. Lynda De la Rosa (#8)
15. Paul H. Looney, Sr. (#20)
16. Paul H. Looney, III (#12)
17. S. Browning Martinez (#2)
18. Carol O'Sullivan (#16)
19. Susan St. James (#7)
20. Sister Beatrice (#13)

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RECORDS MANAGEMENT/ ANSWER SHEET/ACTIVITY TWO

1. 6 Motel (#21)
2. 6th Street Cafe (#13)
3. ABC Florist (#5)
4. Austin, City, Utilities Department (#19)
5. Castro and Caudill Realtors (#14)
6. First Baptist Church (#6)
7. (The) In Town Inn (#12)
8. KVET Radio Station (#23)
9. Willie Kocurek Elementary (#16)
10. Mrs. Johnson's Bakery (#20)
11. New York Journal--Dallas (#10)
12. New York Journal--New York (#18)
13. Deanie Owens Realtors (#11)
14. Owens-Baker Auto Supply
15. San Antonio, City, Power and Light (#17)
16. Southwestern Airlines (#3)
17. South-Western Publishing Co. (#7)
18. Texas Commerce Bank--Barton Creek (#9)
19. Texas Commerce Bank--Northcross (#4)
20. Tracor, Inc. (#1)
21. Tres Amigos Restaurant (#2)
22. United State Government, Internal Revenue Service (#22)
23. Woodmen of the World (#8)

RECORDS MANAGEMENT/ANSWER SHEET/UNIT TEST

1. Filing
2. Coding
3. Indexing
4. Inspecting
5. Micrographics
6. ARMA
7. Incoming Correspondence
8. Store
9. Primary Guides
10. Charge Out
11. Periodic Transfer
12. Married Woman's Legal Name

DEFINITIONS:

A 6 Association of Records Managers & Administrators, Inc.

B 1 Systematic arrangement and storage of materials.

C 8 Placing material in a file according to alphabetic.

D 12 Her first name; middle name; husband's surname.

E 2 Marking caption on correspondence.

F 9 Guides placed to show major divisions in a file.

G 5 Total informations system including filing, filming, retrieval.

H 7 Correspondence originating outside the office.

I 11 Removal of papers from active to inactive file at stated intervals.

J 10 Check out system for removing materials from a file.

K 4 Checking for initials releasing material for filing.

L 3 Arrangement of units for correct alphabetizing order.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(2)(B)

The student will be provided opportunities to identify and demonstrate concepts and skills related to business records management.

OBJECTIVE:	Identify and apply procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records.	MASTERY	NON MASTERY
1.	Define terminology related to database management.	____	____
2.	Demonstrate creation of database files.		
3.	Demonstrate storage of database files.	____	____
4.	Demonstrate retrieval of database files.	____	____
5.	Demonstrate selection and manipulation of data fields.	____	____
6.	Demonstrate printing of database files.	____	____
7.	Design a database report, using numerical averages and record count.	____	____
		____	____
		____	____

STUDENT NAME ______________________________

DATABASE MANAGEMENT/CURRICULUM OUTLINE

UNIT OBJECTIVE **EE 75.87(c)(2)(B)** Identify procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records.

LEARNING OBJECTIVE: Understand and define basic database terminology.

GENERALIZATION: Employees may be required to explain or understand the explanation of a database. Many positions will require employees to organize records. Having a knowledge of the availability of and terminology surrounding database systems will help the employee interact intelligently.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TERMINOLOGY	1. Practice terminology via crossword puzzles or word-finds for identifications.	1. Identify through a multiple-choice test, terminology related to database management systems.
II. HARDWARE A. CPU B. Monitor C. Keyboard D. Printer	2. Research and describe two manufactured-prepared database systems.	2. Identify and define parts of microcomputer hardware.
III. SOFTWARE A. User-designed B. Packaged		

DATABASE MANAGEMENT/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(B)** Identify procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records. (75.87 C-2b)

LEARNING OBJECTIVE: Identify the need for automated management of business records.

GENERALIZATION: With the increasing computer sophistication of offices, employees will be expected to understand the need for uses of database management systems.

CONTENT OUTLINE

I. DATABASE VS. PAPER

- A. Paper "explosion"
  1. Input from paper
  2. Source documents
  3. Filing
- B. Paper Output

II. ADVANCES IN SOFTWARE

- A. Increase
  1. Productivity
  2. Records control
  3. Power/sophistication
- B. Decrease
  1. Costs (software/labor)
  2. Storage space

LEARNING EXPERIENCE

1. View a database storage system on a field trip.
2. View a slide/projector presentation about database management systems.

EVALUATION CRITERIA

1. Identify the need for storing records on a database management system by selecting true or false statements.

DATABASE MANAGEMENT/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(2)(B) Identify procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records.

LEARNING OBJECTIVE: Identify and apply database commands to produce printed reports from database files.

GENERALIZATION: Employees will be expected to retrieve and format reports from database files.

CONTENT OULINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. PRINTING TABULAR REPORTS A. Record-selection criteria B. Field selection	1. Print various reports, using different formats and selection criterion.	1. Design an intermediate database report, using, at a minimum, numerical averages and record count.
II. INCLUDING CALCULATIONS A. Field totals B. Field subtotals (control break) C. Field averages D. Field sub-averages E. Record count F. Record sub-count (control break) G. Computed fields		

DATABASE MANAGEMENT/CURRICULUM OUTLINE

UNIT OBJECTIVE:	**EE 75.87(c)(2)(B)** Identify procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records.
LEARNING OBJECTIVE:	Demonstrate the procedures for automated management of business records, including use of database management software for storage, retrieval, manipulation, selection, and reporting of records.
GENERALIZATION:	Employees will be expected to design, create, and maintain records via a database management system.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. USE OF A DATABASE SYSTEM A. Design entry form B. Edit records C. Search D. Retrieve E. Sort F. Print G. Backing-up	1. Complete database exercise following step-by-step guidelines. 2. Perform data-entry to and editing of database records.	1. Enter data via a teacher-designed form. 2. Design a simple database from specifications. 3. Print a simple list from both database designs above.
II. SYSTEM CONFIGURATION		

DATABASE MANAGEMENT/RESOURCES

TEXTBOOKS

APPLEWORKS TUTORIAL
Apple Computer Co.

COMPUTER FUNDAMENTALS IN THE INFORMATION AGE
Anaheim Publishing Co.

DATABASE APPLICATIONS
South-Western Publishing Co.

ELECTRONIC OFFICE PROCEDURES
Gregg Division/McGraw-Hill Book Co.

INFORMATION PROCESSING CONCEPTS , PRINCIPLES, AND PROCEDURES
South-Western Publishing Co.

INFOSTAR TUTORIAL
Craven Publishing Co.

INTEGRATED SOFTWARE PRINCIPLES AND APPLICATIONS USING LOTUS 1-2-3
Gregg Division/McGraw-Hill Book Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin Co.

THE ART OF USING COMPUTERS
Boyd and Fraser Publishing Co.

THE LOTUS GUIDE TO LEARNING 1-2-3
Addison Wesley Publishing Co.

PRACTICE SETS

APPLEWORKS - INTEGRATED APPLICATIONS FOR MICROCOMPUTERS
South-Western Publishing Co.

APPLICATIONS USING THE PERSONAL COMPUTER
South-Western Publishing Co.

APPLICATIONS USING THE PERSONAL COMPUTER
Gregg Division/McGraw-Hill Book Co.

COMPUTERIZED INVENTORY PROCEDURES
South-Western Publishing Co.

GIFTIQUE: AN INFORMATION MANAGEMENT WORKFLOW
Integrated Business Simulation
South-Western Publishing Co.

MICROCOMPUTER SIMULATION IN BUSINESS
South-Western Publishing Co.

SNOWDRIFT ICE CREAM
Gregg Division/McGraw-Hill Book Co.

TRONICS, INC.
South-Western Publishing Co.

WORD PROCESSING CONCEPTS AND APPLICATIONS
Gregg Division/McGraw-Hill Book Co.

SOFTWARE

APPLEWORKS
Apple Computer Co.

DBASE III +
Ashton-Tate Publishing Co.

ELECTRIC DESK
Alpha Software

FILING ASSISTANT INSTRUCTIONAL MODULE
Pass Publications

FRAMEWORK II
Ashton-Tate Publishing Co.

IBM FILING ASSISTANT
IBM Personal Computer Division

INFOSTAR
MicroPro International Corp.

JAZZ
Lotus Development Corp.

LOTUS 1-2-3
Lotus Development Corp.

MICROSOFT WORKS
Microsoft

OPEN ACCESS
Software Products International

PFS: FILE AND REPORT
Software Publishing Corp.

QUICK FILE II
Apple Computer Co.

WRITING ASSISTANT
IBM Personal Computer Division

DATABASE MANAGEMENT/UNIT OVERVIEW

I. TERMINOLOGY

A. *Arrange/Sort*: grouping records in a file, either alphabetically or numerically, by a pre-selected field.

B. *Data entry*: entering information into a pre-programmed software package.

C. *Database*: a group of related data that is organized and stored so it can be easily changed, calculated, updated, and then retrieved in a variety of formats.

D. *Delete*: remove one character, line, or block of data. Generally a delete function is permanent.

E. *Delete record*: removing a record from the database.

F. *Floppy disk*: a small, flexible sheet of plastic, coated with a magnetic material on which a large amount of data or information can be stored magnetically.

G. *Field length*: the number of character positions allotted to the data in a specific field.

H. *Field name/item name*: the label assigned to an item of data.

I. *Field type*: data classification, assigned depending on how the data will be used. Classifications used are numeric, logical, character/text/alpha, date, or memo.

J. *Field*: the smallest unit of storable data. A name, address, phone number, and social security number are all individual fields.

K. *File name*: the name assigned to a file.

L. *File*: a group of related records.

M. *Form design*: designating a layout for data entry, consisting of the field names. The form is used to enter data into the fields of a database.

N. *Function keys*: a set of keys which are pre-set with certain complex operations. With a single keystroke, the operator may invoke the function. Function keys are unique according to the software package being used.

O. *Hard copy*: a paper document that is typed, written, or printed.

P. *Hardware*: the electronic, electrical, and mechanical devices used in a system; the equipment of a computer system.

Q. *Input*: data that is entered for processing.

R. *Insert*: the ability to add characters, spaces, or an entire line to a document, field, or record.

S. *Numeric field*: a field that will contain only numeric data which can be used in calculations.

T. *Output*: the final results after input data is processed.

U. *Print screen*: printing an exact copy of the information on the computer monitor.

V. *Record*: a collection of related fields. Fields such as name, social security number, and address that are related to one person, would be considered a record.

W. *Report*: printed and formatted information from a database or other collection of data.

X. *Search/Locate/Find*: to retrieve data from the database based on a specific criterion.

Y. *Updating a record*: adding or changing information to a field or fields within a record.

Z. *View/Display/Browse/Search*: looking at the records stored in a database.

II. DATABASE RECORDS MANAGEMENT VS. PAPER RECORDS MANAGEMENT

A. *Computers have added to the "paper explosion" in offices.*

  1. Input from a paper document.

  2. Output in form of a printout.

B. *Need of businesses to work from hard copy or original source document.*

C. *Many businesses unwilling to "destroy" paper document.*

D. *Computers now "user friendly".*

  1. More powerful and less expensive.

  2. Increase records control productivity.

  3. Reduce filing time and labor cost.

  4. Reduce space required for storage.

  5. Essential and justifiable complement to records control system.

III. COMPONENTS OF A DATABASE

A. *Hardware*

  1. CPU (Central Processing Unit)

    a. Floppy disk
    b. Fixed disk

  2. *Monitor*

  3. *Keyboard*

  4. *Printer*

B. *Software*

1. *File/record* function

2. *Tabular* report function

IV. USE OF DATABASE FILING SYSTEM

A. *Design form.*

B. *Edit file by entering, modifying or deleting record.*

C. *Search mode for updating information.*

D. *Retrieving or transferring information.*

E. *Sorting information according to designated field.*

F. *Printing information/record.*

G. *Backing up (copying file).*

H. *Configure system.*

V. SETTING UP A FORM (These steps will vary according to software package used)

A. *Design a file.*

1. *Create* a new file.

2. *Add,* delete, or move items.

3. *Change* existing item names.

4. *Store* by depressing function key.

B. *Input information into file.*

1. *Add* forms by filling in information in each field.

2. *Guidelines* for filling in forms.

    a. Presort information into groups according to needs.
    b. Enter last names first to print in alphabetical order by last name.
    c. Enter numbers so they are the same length.
    d. Be consistent in entering dates for sorting purposes.

3. *Quick* entry for repetitive information.

C. *Search and update*

1. *Search* methods

    a. Full item matches.

        b. Partial item matches.
        c. Numeric item matches.
        d. Numeric range matches.
        e. No match.

    2. *Update* methods

        a. Review the document, and
        b. Add, delete, or change information, or
        c. Remove the form.

D. *Print information from file.*

    1. Select *print option* from menu.

    2. Select *forms* to be printed.

    3. Select pre-defined *print specifications,* if necessary.

VI. STEPS IN PRINTING A SIMPLE TABULAR REPORT

A. *Select print from main menu.*

B. *Choose forms to be printed by filling in search specifications.*

C. *Choose and organize report columns.*

VII. STEPS IN PRINTING A MORE COMPLEX TABULAR REPORT

A. *Change column headings, if necessary.*

B. *Determine column calculations.*

    1. *Total:* adds all numbers in a column and prints total.

    2. *Subtotal:* produces subtotal for each new item in a column and a grand total at the end of the report.

    3. *Average:* numerical average of items in a column.

    4. *Subaverage:* produces a subaverage for each new item in a column, and prints an average of all the numbers at the end.

    5. *Count:* counts the alpha or numeric entries in a column.

    6. *Subcount:* gives a subcount for each new item in a column and a complete count at the end.

C. *Derived columns: developed from information in other columns.*

DATABASE MANAGEMENT/ACTIVITY ONE

NOTE TO TEACHER: All software on the market is different; some do not have the necessary functions to do all of the applications. Encourage students to complete all applications and use creativity in finding other ways to achieve the correct procedure. In business, an application is not skipped simply because it is too difficult.

DIRECTIONS: Complete this activity step-by-step, as guided by your teacher. Create a mailing list to be used for mailing letters to parents.

Following are ten names and addresses:

1. George C. Scott, 1112 Easthaven Drive, Pasadena, TX 77504
2. Dorie Copeland, Box 162, Pettus, TX 78102
3. Linda McDonald, 2326 South 39th Street, Dime Box, TX 79605
4. Robert LaMonine, Suite 102, First City National Bank Bldg., Houston, TX 77002
5. Sandra Sue Patterson, 702 Randall Street, Pasadena, TX 77506
6. Kenneth C. Dozier, 1108 Montana Drive, Abilene, TX 79331
7. Lee Johnson, 9501 Martindale Road, Muleshoe, TX 79003
8. Leigh Ann Johnston, 331 Buckskin Pass, Austin, TX 78745
9. Paul C. Davis, Apartment 16, 202 Crockett, Austin, TX 78704
10. Belinda Luther, 10800 Lamar Street, Austin, TX 78757

STEPS TO SET UP DATA BASE FILE:

1. Determine the format to use.
2. Create file format with use of software program.
3. Enter file onto format.
4. Edit file by search and update mode on menu.
5. Print the file in the following forms:
    a. Alphabetically by last name.
    b. Alphabetically by city.
    c. Numerically by zip code.

DATABASE MANAGEMENT/ACTIVITY ONE (continued)

6. Add two more names to mailing list by using search and update mode:

    11. Marie Schmidt-Fox, 513 Blueberry Road, Dallas, TX 72051

    12. Leon Morrow, One Silver Fox Drive, Dallas, TX 72033

7. Print out a new listing as you did in step 5.

REVIEW FOR ACTIVITY ONE

1. What are the fields/categories used to format this file?
2. Why did you input the surname first?
3. How did you select the order of the columns?
4. How did you search and update to correct/add names?
5. List in correct order the steps/procedures in setting up the above problem.

DATABASE MANAGEMENT/ACTIVITY TWO

DIRECTIONS: Create a database file for parking permits issued to student drivers. The name of the file will be PARKING PERMITS.

STEP 1: **Planning fields/catagories:**

NAME OF STUDENT:

ADDRESS OF STUDENT:

DRIVER'S LICENSE NO.:

MAKE OF CAR:

MODEL OF CAR:

YEAR OF CAR:

LICENSE PLATE NO.:

PARKING LOT:

PERMIT NO.:

INFORMATION TO BE ENTERED:

1. Joseph Durkin, 303 Smith Lane, TXDL 24680345, 1974 Chevy Camaro, PTZ-154, Lot C, Permit 103
2. Larry Gage, 1808 Stanley Drive, TXDL 34827682, 1982 Ford Ranger Pickup, 775-4NP, Lot B, Permit 101
3. Sandra Jones, 4419 Circle C Road, TXDL 64854881, 1985 Nissan 300ZX, 331-MNO, Lot C, Permit 110
4. Richard B. Jennings, 1003 Oak Ledge, TXDL 17636403, 1988 Ford Mustang, ENM-513, Lot A, Permit 107
5. Denise Campbell, 7538 Oak Ridge Circle, TXDL 23348900, 1969 Chevy Impala, 118-XOP, Lot C, Permit 105
6. Mary Beth Loomis, 416 Queens Road, Apartment 101, TXDL 98650530, 1970 Honda Civic, BIM-912, Lot C, Permit 108
7. Jeff Cox, 1819 Stanley Drive, TXDL 05307688, 1983 Chevy Blazer, 639-9XT, Lot B, Permit 102

8. Juan C. Garcia, 1611 Easthaven, TXDL 53789103, 1981 Chevy Silverado, 826-PL4, Lot A, Permit 109

9. LaWanna Alexander, 908 East 11th, TXDL 48731226, 1979 Toyota Corolla, BTF-118, Lot A, Permit 104

10. Betty Perkins, 2326 South Moreland Drive, TXDL 83765432, 1937 Ford Coupe, RUMBLESEAT, Lot A, Permit 106

STEP 2: **Student designs/creates database file.**

STEP 3: **Add/Enter data, record by record.**

STEP 4: **Run/Print data:**

A. Print alphabetically by student surname, using all information in the file with item names listed.

B. Print in numeric order by parking permit no. Information to be included: car license no. and student name. DO NOT PRINT ITEM NAMES.

C. Print by make of car including model, year, and student name.

D. Print in tabular/column format including: lot no., permit number, make of car, license plate no., and student name.

STEP 5: **Revise the parking Permit File:**

A. Delete the 1983 Chevy Blazer; replace it with a 1988 Chrysler LaBaron, license no. QWT-113. (Jeff Cox)

B. Change the address of Richard Jennings to 9501 Queenswood Drive.

C. Larry Gage had his license suspended, so his permit number will be removed from the file temporarily.

STEP 6: **Re-run an alphabetic listing of the complete file in tablular/columnar format; list all information. Omit students' addresses.**

REVIEW FOR ACTIVITY TWO

1. To whom does the 1983 Blazer belong? ____________________

2. To whom does Parking Permit 101 belong? ________________

3. How many cars are parked in Lot A? ____________________

4. Who lives on Oak Ledge? ____________________________

DATABASE MANAGEMENT/ACTIVITY TWO/REVIEW (continued)

5. Where did he move? ____________________

6. Who owns the Silverado, Chevy Pickup? ____________________

7. Where does LaWann, Chevy Pickup? ____________________

7. Where does LaWanna Alexander live? ____________________

8. Who has Driver License No. 23348900? ____________________

9. Who owns a 1974 Camaro? ____________________

10. Which parking lot has the fewest cars? ____________________

DATABASE MANAGEMENT/ACTIVITY THREE

DIRECTIONS: Create a database file for Student Schedules. The name of the file will be STUDENT SCHEDULE.

STEP 1: **With pencil and paper, plan the fields/categories needed.**

INFORMATION TO BE ENTERED

1. David Gomez; 11th Grade; #93827160; 1--English 1032; 2--Am. History 4840; 3--Spanish 2415; 4--Bus. Inf. Processing 8124; 5--Algebra 6918; 6--Bus. Law 0415; A lunch
2. Shannon Jones; 12th Grade; #9008764; 1--Bus. Inf. Processing 8124; 2--Typing 0312; 3--Algebra 6918; 4--Government 4810; 5--Economics 4915; 6--English 1042; A lunch
3. Michelle Lane; 9th Grade; #9111544; 1--English 1011; 2--World History 4749; 3--Spanish 2405; 4--Typing 0311; 5--Algebra 6908; 6--Physical Science 3020; B lunch
4. James Cain; 10th Grade; #9432109; 1--English 1022; 2--Microcomputer App. 8123; 3--Typing 0312; 4--Biology 3140; 5--Geometry 6818; 6--World History 4749; A lunch
5. Debra McNutt; 12th Grade; #9334289; 1--Office Administration Co-Op 8135; 2--English 1042; 3--Accounting 0121; 4--Health 2113; 5--Special Assignment; 6--Special Assignment; B lunch
6. Steve Martinez; 12th Grade; #9015431; 1--Creative Writing; 2--Drafting 9810; 3--Algebra 6918; 4--Government 4810; 5--Accounting 0121; 6--Physics 3240; B lunch

STEP 2: **Design/create database file.**

STEP 3: **Add/enter information on design form.**

STEP 4: **Run/print data as follows:**

A. Run alphabetically by student name. Include ONLY the scheduled classes.

B. Run alpahbetically by Classification: include student name and student number in a columar/tabular report.

C. Run ONLY periods 1, 3, and 5. Include student name.

D. Run a list of students in 12th. grade.

DATABASE MANAGEMENT/UNIT TEST

FILL IN THE BEST ANSWER.

1. Which function key is used to print a copy of a record which appears on the screen?

   ____

2. Why would a file containing the Student Directory information be named "StdntDir" rather than "Student Directory"? ____

3. When entering information into a database, which of the following methods would be better for sorting? Why?

   _____ Sara Jane Martin or _____ Martin, Sara Jane

   ____

4. The first step in creating a new file is to ____

   ____.

5. Do you have the option to omit the field names when printing?

   ____

SELECT THE BEST ANSWER - TRUE OR FALSE.

6.________ A database program allows you to store and organize information efficiently, and allows you to find exactly the information you want.

7.________ A colon is used to mark the end of one field name and the beginning of the next.

8.________ In planning a database, you should make the last field on your form the one you will search for most often.

9.________ It doesn't matter how you enter numbers in the database because the program has the capability to quickly put information into ascending or descending order.

10.________ Chronological data should be entered in order by year/month/day.

11.________ A field name is used to identify each type of information in a form design.

12.________ A truncated report will have some information in the first column shortened.

13.________ A derived column is a newly created column produced by an existing one.

14.________ In a tabular report, if two fields in column 1 are identical, the two records would be arranged on the basis of the column 2 information.

15.________ Alphabetic columns can be arranged in reverse order (also called descending order).

ACTIVITY ONE

This will be evaluated to the satisfaction of the instructor.

REVIEW FOR ACTIVITY ONE

1. The fields or categories used are name, address, city, state, and zip.
2. Put surname first so that the program will alphabetize by surname.
3. Selected the order of the columns by numbering them; first column is always alphabetized or put in numerical order.
4. Searched and updated to correct or add names by selecting the proper function from the program menu.
5. Steps/procedures to set up mailing problem:
   a. Decide what information is needed.
   b. Create a file format.
   c. Input information on the file format.
   d. Correct errors and add additional names to mailing list by search function from menu.
   e. Print by selecting function from menu or using print program.

ACTIVITY TWO

NAME OF STUDENT:	Alexander, LaWanna
ADDRESS OF STUDENT:	908 East 11th
DRIVER'S LICENSE NO.:	48731226
MAKE OF CAR:	Toyota
MODEL OF CAR:	Corolla
YEAR OF CAR:	1979
LICENSE PLATE NO.:	BTF-118
PARKING LOT:	Lot A
PERMIT NO.:	104

DATABASE MANAGEMENT/ACTIVITY TWO/ANSWER SHEET (continued)

NAME OF STUDENT: Campbell, Denise
ADDRESS OF STUDENT: 7538 Oak Ridge Circle
DRIVER'S LICENSE NO.: 23348900
MAKE OF CAR: Chevy
MODEL OF CAR Impala
YEAR OF CAR: 1969
LICENSE PLATE NO.: 118-XOP
PARKING LOT: Lot C
PERMIT NO.: 105

NAME OF STUDENT: Cox, Jeff
ADDRESS OF STUDENT: 1819 Stanley Drive
DRIVER'S LICENSE NO.: 05307688
MAKE OF CAR: Chevy
MODEL OF CAR: Blazer
YEAR OF CAR: 1983
LICENSE PLATE NO.: 639-9XT
PARKING LOT: Lot B
PERMIT NO.: 102

NAME OF STUDENT: Durkin, Joseph
ADDRESS OF STUDENT: 303 Smith Lane
DRIVER'S LICENSE NO.: 2468035
MAKE OF CAR: Chevy
MODEL OF CAR: Camaro
YEAR OF CAR: 1974
LICENSE PLATE NO.: PTZ-154

DATABASE MANAGEMENT/ACTIVITY TWO/ANSWER SHEET (continued)

PARKING LOT: Lot C
PERMIT NO.: 103

NAME OF STUDENT: Gage, Larry
ADDRESS OF STUDENT: 1808 Stanley Drive
DRIVER'S LICENSE NO.: 34827682
MAKE OF CAR: Ford Pickup
MODEL OF CAR: Ranger
YEAR OF CAR: 1982
LICENSE PLATE NO.: 775-4NP
PARKING LOT: Lot B
PERMIT NO.: 101

NAME OF STUDENT: Garcia, Juan C.
ADDRESS OF STUDENT: 1611 Easthaven
DRIVER'S LICENSE NO.: 53789103
MAKE OF CAR: Chevy Pickup
MODEL OF CAR: Silverado
YEAR OF CAR: 1981
LICENSE PLATE NO.: 826-PL4
PARKING LOT: Lot A
PERMIT NO.: 109

NAME OF STUDENT: Jennings, Richard B.
ADDRESS OF STUDENT: 1003 Oak Ledge
DRIVER'S LICENSE NO.: 17636403
MAKE OF CAR: Ford

DATABASE MANAGEMENT/ACTIVITY TWO/ANSWER SHEET (continued)

MODEL OF CAR:	Mustang
YEAR OF CAR:	1988
LICENSE PLATE NO.:	ENM-513
PARKING LOT:	Lot A
PERMIT NO.:	107

NAME OF STUDENT:	Jones, Sandra
ADDRESS OF STUDENT:	4419 Circle C Road
DRIVER'S LICENSE NO.:	64854881
MAKE OF CAR:	Nissan
MODEL OF CAR:	300ZX
YEAR OF CAR:	1985
LICENSE PLATE NO.:	331-MNO
PARKING LOT:	Lot C
PERMIT NO.:	110

NAME OF STUDENT:	Loomis, Mary Beth
ADDRESS OF STUDENT:	416 Queens Road, Apt. 101
DRIVER'S LICENSE NO.:	98650530
MAKE OF CAR:	Honda
MODEL OF CAR:	Civic
YEAR OF CAR:	1970
LICENSE PLATE NO.:	BIM-912
PARKING LOT:	Lot C
PERMIT NO.:	108

NAME OF STUDENT:	Perkins, Betty

DATABASE MANAGEMENT/ACTIVITY TWO/ANSWER SHEET (continued)

ADDRESS OF STUDENT:	2326 South Moreland Drive
DRIVER'S LICENSE NO.:	83765432
MAKE OF CAR:	Ford
MODEL OF CAR:	Coupe
YEAR OF CAR:	1937
LICENSE PLATE NO.:	RUMBLESEAT
PARKING LOT:	Lot A
PERMIT NO.:	106

REVIEW FOR ACTIVITY TWO

1. Jeff Cox
2. Larry Gage
3. 4
4. Richard B. Jennings
5. 9501 Queenswood Dr.
6. Juan C. Garcia
7. 908 East 11th
8. Denise Campbell
9. Joseph Durkin
10. B

DATABASE MANAGEMENT/ACTIVITY THREE/ANSWER SHEET

STUDENT NAME: Cain, James
PERIOD 1: English 1022
PERIOD 2: Microcomputer App.8123
PERIOD 3: Typing 0312
PERIOD 4: Biology 3140
PERIOD 5: Geometry 6818
PERIOD 6: World History 4749
LUNCH: A

STUDENT NAME: Gomez, David
PERIOD 1: English 1032
PERIOD 2: American History 4840
PERIOD 3: Spanish 2415
PERIOD 4: Bus. Inf. Processing 8124
PERIOD 5: Algebra 6918
PERIOD 6: Business Law 0415
LUNCH: A

STUDENT NAME: Jones, Shannon
PERIOD 1: Bus. Inf. Processing 8124
PERIOD 2: Typing 0312
PERIOD 3: Algebra 6918
PERIOD 4: Government 4810
PERIOD 5: Economics 4915
PERIOD 6: English 1042
LUNCH: A

STUDENT NAME: Lane, Michelle
PERIOD 1: English 1011
PERIOD 2 World History 4749
PERIOD 3: Spanish 2405
PERIOD 4: Typing 0311
PERIOD 5: Algebra 6908
PERIOD 6: Physical Science 3020
LUNCH: B

DATABASE MANAGEMENT/ACTIVITY THREE/ANSWER SHEET (continued)

STUDENT NAME: Martinez, Steve
PERIOD 1: Creative Writing 1048
PERIOD 2: Drafting 9810
PERIOD 3: Algebra 6918
PERIOD 4: Government 4810
PERIOD 5: Accounting 0121
PERIOD 6: Physics 3240
LUNCH: B

STUDENT NAME: McNutt, Debra
PERIOD 1: Office Adm. Co-Op 8135
PERIOD 2: English 1042
PERIOD 3: Accounting 0121
PERIOD 4: Health 2113
PERIOD 5: Special Assign. 9955
PERIOD 6 Special Assign. 9956
LUNCH: B

DATABASE MANAGEMENT/UNIT TEST/ANSWER SHEET

UNIT TEST

1. F7
2. Too long; 8-10 is the usual maximum length
3. Martin, Sara Jane -- Surname first facilitates alphabetizing.
4. Design a form
5. Yes
6. True
7. True
8. False
9. False
10. True
11. True
12. False
13. True
14 True
15. True

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(2)

The student will be provided the opportunity to identify and demonstrate concepts and skills related to business records management.

OBJECTIVE:	Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.	MASTERY	NON MASTERY
1.	Identify and define the terminology related to electronic manipulation of data and to electronic software.	______	______
2.	Identify and define the terminology related to electronic spreadsheet software.	______	______
3.	Identify business applications of electronic spreadsheet software.	______	______
4.	Demonstrate the fundamental concepts for processing alphanumeric data with electronic spreadsheet software.	______	______
5.	Apply spreadsheet software through the use of prepared templates.	______	______
6.	Recognize and correct fundamental error conditions within spreadsheet applications.	______	______
7.	Apply spreadsheet software through student-designed problem solutions.	______	______
8.	Evaluate spreadsheet software in regard to that which is appropriate for specific office tasks.	______	______
		______	______

STUDENT NAME________________________________

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE:	**EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.
LEARNING OBJECTIVE:	Identify and define the terminology related to spreedsheet software and the electronic manipulation of spreedsheet data.
GENERALIZATION:	Spreadsheet software packages share common terms. Understanding these will lead to the ability to master virtually any spreadsheet software.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. GENERAL TERMINOLOGY	1. Discuss terminology	1. Student can successfully match word and definition of each of the spreadsheet terms through a matching exam.
II. SPREADSHEET TERMS	2. Complete worksheet handout for identification of the vital parts of all spreadsheet.	2. Student can identify various terms on a worksheet handout.
	3. View demonstration of spreadsheet software.	

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Understand business applications of electronic spreadsheet software and will predict which applications could effectively utilize this type of software.

GENERALIZATION: Employees are frequently left to their own ingenuity to develop analysis or tracking procedures. Having systematic tools, and being aware of how they can be applied, can lead to increased efficiency and productivity.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. BUSINESS APPLICATIONS A. Secretaries 1. tracking expenditures 2 vacation scheduling 3. room scheduling B. Accounting 1. budgets 2. payroll 3. checking accounts 4. income tax preparation C. Inventory Tracking D. Managers 1. projecting and analyzing sales 2. what-if analysis 3. calculating commissions	1. Lecture/discussion of business applications. 2. Identifying business problems that could be solved using spreadsheet software.	1. Students should be able to identify from a list of business-related appliations, those whose problems could best be solved using spreadsheet software.

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(2)(C) Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Apply spreadsheet software through the use of prepared templates.

GENERALIZATION: Employees are often called upon to enter data into spreadsheet templates. As with any computer-related activity, fundamental data entry precedes more complex activities. Employees may also be asked to summarize "what-if" calculations using a spreadsheet template.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. WORKSHEET RETRIEVAL	1. Spreadsheet Tutorial.	1. Students should be able to, at a minimum, enter given data into a manually prepared template and, given simple formulas, be able to simulate the work of an electronic spreadsheet.
	2. Data entry into prepared template.	
II. CURSOR/POINTER MOVEMENT	3. Manual entry into paper-worksheet and performance of related calculations.	2. Students should be able to enter data into an electronically prepared template and summarize "what-if" entries.
III. DATA ENTRY		
IV. EDITING CELL CONTENTS		
V. WHAT-IF ANALYSIS		

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Demonstrate the fundamental concepts for processing alphanumeric data with electronic spreadsheet software.

GENERALIZATION: Understanding basic concepts of spreadsheet utilization provides the foundation for being operationally competent with these software packages.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. SPREADSHEET STARTUP	1. Entry of a prepared worksheet with specific, keystroke-by-keystroke instructions.	1. Students will start-up the software package and enter given values into the worksheet.
II. CREATING A WORKSHEET A. Naming B. Saving C. Printing	2. Identification worksheet of cell values, cell address, and various value and label formats.	2. Students will select, from a worksheet or list, correct answers concerning cell contents, cell addresses, and various value and label formats.
III. DEFAULT VALUES A. Settings B. Changing		
IV. CELLS A. Addresses B. Contents		
V. FORMATS A. Labels B. Values		

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Apply fundamental concepts of spreadsheet software through the design and entry of a simple to intermediate level worksheet and recognize correct fundamental error conditions.

GENERALIZATION: Employees may be required to prepare worksheets for fundamental business problems.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. FUNDAMENTAL APPLICATION CONCEPTS A. Designing the worksheet B. Understand the Ppoblem C. Design the solution D. Enter the worksheet E. Test and edit	1. Design a worksheet to solve a business-related problem. 2. Enter the designed worksheet via spreadsheet software. 3. Error worksheet	1. Students should be able to, at a minimum, design the layout and formulas for a simple worksheet. Ideally, students will also enter the worksheet successfully via an electronic spreadsheet. 2. Students will detect error conditions, particularly where formulars are concerned.
II. ERROR CONDITIONS A. Cell width B. Value/label C. Formula transposition	4. Correction of prepared worksheet errors.	3. Students should be able to explain or perform fundamental error correction.

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Demonstrate operation procedures related to spreadsheet software.

GENERALIZATION: Employees may be called upon to create worksheets, given specific formulas, or to edit existing worksheets.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. FORMULAS	1. Entry of a prepared spreadsheet with specified formulas.	1. Students, given specific formulas, will be able to enter a worksheet.
II. FUNCTIONS	2. Worksheet editing. 3. Formula worksheet.	2. Given specific instructions, students will perform editing functions to a prepared worksheet.
III. RECALCULATION A. Automatic B. Manual		
IV. COLUMN-WIDTH		
V. EDITING A. Inserting-rows/columns B. Deleting-rows/columns		

ELECTRONIC SPREADSHEET/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(2)(C)** Identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

LEARNING OBJECTIVE: Evaluate spreadsheet software in regard to that which is appropriate for specific office tasks.

GENERALIZATION: Employees may be asked to evaluate and select spreadsheet software based upon given criteria.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. MAXIMUM WORKSHEET SIZE	1. Identification worksheet relating criteria with necessary spreadsheet function.	1. Students should understand that while fundamentally the same, spreadsheet software will vary with regard to more complex capabilities.
II. BUILT-IN FUNCTIONS	2. Spreadsheet evaluation report from a computer store or magazine.	2. Students should be able to identify what spreadsheet capabilities would be required for given applications.
III. APPLICATIONS DIFFERENCES A. Scientific/medical B. Business/accounting C. Database possibilities D. Ease-of-use features 1. cell editing		

ELECTRONIC SPREADSHEET/RESOURCES

TEXTBOOKS

APPLEWORKS - INTEGRATED APPLICATIONS FOR MICROCOMPUTER
Clayton & Park

COMPUTING TODAY: MICROCOMPUTERS AND APPLICATIONS
Houghton Mifflin Publishing Co.

INTEGRATED SOFTWARE: PRINCIPLES AND APPLICATIONS USING LOTUS 1-2-3
Close

INTRODUCING COMPUTERS
John Wiley & Sons

THE LOTUS GUIDE TO LEARNING 1-2-3
Addison-Wesley

PRACTICE SETS

1-2-3 RUN
Flast and Flast

1-2-3 QUICK
Smith

THE AUDITING CLERK
South-Western Publishing Company

APPLEWORKS - INTEGRATED APPLICATIONS FOR MICROCOMPUTER
South-Western Publishing Company

INTEGRATED SOFTWARE: PRINCIPLES AND APPLICATIONS USING LOTUS 1-2-3
Close

THE LOTUS GUIDE TO LEARNING 1-2-3
Lotus Development Corp.

MICROCOMPUTER SIMULATIONS IN BUSINESS
South-Western Publishing Company

SPREADSHEET SKILL BUILDING EXERCISES AND APPLICATIONS
Dictation Disc Co.

SOFTWARE

APPLEWORKS
Apple Computer

ELECTRIC DESK
Alpha Software

LOTUS 1-2-3
Lotus Development Corp.

MICROSOFT WORKS
Microsoft

MULTIPLAN
Microsoft

OPEN ACCESS
Software Products International

PFS: PLAN
Software Publishing Corp.

PLANNING ASSISTANT
IBM Personal Computer Division

PLANNING ASSISTANT INSTRUCTIONAL MODULE
Pass Publications

SUPERCALC 3a/4
Computer Associates

2. *Vacation scheduling*:

   a. Through a complex worksheet, the spreadsheet software can compare dates and job titles to avoid a conflicting vacation.
   b. Provides a means of easily changing vacation times, again alerting to possible conflicts.
   c. Allows a professionally prepared and official-looking document.

3. *Room scheduling*:

   a. Conference rooms, training rooms, etc., must be coordinated through a central point so that conflicts do not occur.
   b. Through a complex spreadsheet, the software can compare dates, times and rooms, to insure no conflicts exist.
   c. Publish a scheduling document for reference or for use as a source document for those who wish to schedule a meeting room.

B. *Accounting Applications*

1. *Budgets*: Typically, titles will identify the various categories of budgeted items.

   a. The current year's actual figures will be listed in one column.
   b. The next year's budget figures will be listed in the next column.
   c. The difference between these two columns will be calculated by the spreadsheet software in the third column. One example of this follows:

Budgeted Item	This Year	Next Year	Difference
Typing Paper	$500.00	$450.00	-$50.00
Pencils	$ 45.00	$ 45.00	$0.00
Typewriter Ribbons	$100.00	$ 80.00	-$20.00
Computer Printer Ribbons	$ 50.00	$200.00	$150.00

2. *Payroll*:

   a. Through the use of a simple worksheet, the software can perform the computations based upon formulas previously entered.

      (1) Hours worked times
      (2) Rate of Pay equals
      (3) The Gross Pay.

   b. Deductions, such as payroll taxes, social security, and insurance, can also be entered as formulas within the worksheet.

3. *Checking Accounts*:

   a. A worksheet can be set up to compute the balance of the account based upon the entry of check amounts or deposit amounts.
   b. By having this data entered into the computer, it is simple to keep the balance current.
   c. In this way, it is easy to produce a document for use in reconciling the checking account against the bank statement.

4. *Income Tax Preparation*:

   a. Because tax forms change from year-to-year, software overlays called "templates" are an inexpensive way to have current software.
   b. A template is a pre-prepared set of formulas that will work over or with a pre-existing spreadsheet software package.
   c. These worksheets, with their formulas, contain income information. With the spreadsheet software, the templates will provide the user with the taxes owed or the amount of the refund.

5. *Inventory Tracking*:

   a. Persons track how many of an item are on-hand (in the store, warehouse, etc.).
   b. How much the item costs.
   c. What number it is necessary to reorder.
   d. The date the item was last sold.

C. *Managers*

1. *Projecting and Analyzing Sales*:

   a. Managers insure that sales of their various products or services occur at a rate that will allow the business to make money. An electronic spreadsheet can pinpoint what sells and what doesn't sell.
   b. Using a spreadsheet software package, a sales manager can track individual salespersons and their sales amounts for each of the twelve months of the year.

2. *What-If Analysis*:

   a. A manager can make decisions using projected "scenarios."
   b. Example: A manager wishes to purchase a new copy machine:

Office Expenses (Copying)

No. of Copies	Cost	Total/month
1500	.10	$150.00
Employee Payrate	Time	Total/month
$7.50/hour	20 hours	$150.00
	Total	$300.00

Copying Machine Expenses

Monthly Payment		Supplies/Mo.
$100.00		$30.00
Employee Payrate	Time	Total/month
$7.50/hour	6 hrs.	$45.00
	Total	$75.00

If the employee needs 20 minutes driving time to and from the copy shop and it takes approximately 20 minutes to make the needed 75 copies (1500 copies a month is approximately 75 copies per day), then 20 hours per month of the employee's time is used making copies. With the new copy machine, the same 20 minutes per day will be needed to make the copies, but without the travel time, so the cost is cut to 6 hours per month. By using the spreadsheet to perform these calculalations, the manager can easily see that it will be cheaper to have an in-house copy machine. The manager could also change the figures of the cost of the copy machine, perhaps to a more deluxe and expensive model, to see at what point he would "break-even", in short "what-if we do this, versus what if we do that."

3. *Calculating Commissions*:

   a. A commission is a percentage of the total amount of sales.
   b. A worksheet within an electronic spreadsheet provides an accurate means for the computations.
   c. A worksheet also gives the manager up-to-date commissions figures at the touch of a button.

III. USING PREPARED TEMPLATES

Prepared templates are worksheets that have been set up with labels and formulas.

A. *Worksheet Retrieval* - copying the prepared worksheet from a disk to the computer's memory.

   1. The worksheet must be in the computer's primary memory before any processing can be accomplished through the spreadsheet software.

   2. The worksheet is generally referred to as a file.

   3. The way in which a worksheet or file is retrieved varies between the different spreadsheet packages.

B. *Cursor/Pointer Movement* - the cursor or pointer is the highlighted block on a worksheet that shows in which cell the next entered data will be displayed and stored.

C. *Data Entry* - simply typing data into the worksheet.

1. Based upon the format, the formulas or cell width, the data alternately will be displayed and formatted.

2. Type the required words or numbers and press either the enter, the return keys or the arrow keys.

3. The arrow keys will enter the data into the cell (the one highlighted with the pointer or cursor) and also will move to the next cell that is in the direction of the arrow key pressed.

D. *Editing Cell Contents* - in many of the early spreadsheet software packages, the only way to edit or change the contents of a cell was to retype the entry.

1. Today's electronic spreadsheet software packages allow editing one cell at a time.

2. Placing the spreadsheet into "edit mode" will vary depending upon the software used.

    a. "changing values"
    b. "changing cell contents"
    c. "updating values"
    d. "updating cell contents"
    e. "data editing"

E. *What-if Analysis*

1. Allows the user to change various values within the worksheet.

2. The spreadsheet software automatically recalculates the worksheet based upon the new values.

    a. Allows managers to project and analyze the effects various financial activities will have on their business.
    b. Recognize the changes that a new value causes within the entire worksheet.

IV. CONCEPTS FOR PROCESSING ALPHANUMERIC DATA

A. *Spreadsheet Start-up*

1. "Self-booting":

    a. Place the diskette containing the software into the disk drive and turn on the computer.
    b. The software will automatically be initiated and instructions for beginning will be displayed.

2. Type a command into the computer.

    a. These commands can be found in the software manual and are usually shortened forms of the name of the software.
    b. Some examples:

Software Package   Start-up Command

Lotus 123	lotus or 123
Symphony	symphony
Appleworks	self-booting

B. *Creating a Worksheet*

1. *Naming* - All worksheets are stored on the disk and in the computer's primary storage in the form of files.

    a. Each file must have a unique filename.
    b. The number of characters and allowable characters will vary, depending upon the software package.

        (1) Apple IIE series--characters or numbers can take up to 15 positions.
        (2) IBM-type software--uses up to eight characters, with no spaces.

2. *Saving* - All worksheets must be saved to the disk or diskette.

    a. While working on a worksheet, it is temporarily stored in the computer's primary memory. Once you turn the computer off, however, the worksheet will no longer be stored.
    b. It is necessary, therefore, to save (actually copy) the worksheet from primary memory to the diskette.
    c. Once saved, the worksheet will be in the computer's primary memory (until you retrieve another file, or turn the computer off) and a copy will also be on secondary storage, the diskette.
    d. With some software packages, you will name the file before you begin to work.
    e. In others, the naming and saving function will take place after the worksheet is entered.

3. *Printing* - It is possible to print all or part of a worksheet to the computer's printer. The software allows the user to specify which columns or rows to print, leaving the entire spreadsheet intact.

C. *Default Values* - Those settings the software package will use if the user does not specify other values.

1. *Settings* - Spreadsheet software will have several default settings. Two partial sets of default settings are given below:

    a. Appleworks:

Column Width	9 spaces
Recalculation	Automatic
Value Format	Appropriate
Label Format	Left-Justified

    b. Lotus 123:

Column Width	9 spaces
Recalculation	Automatic
Value Format	General

Label Format	Left-Justified

2. *Changing Default Settings*

   a. Most spreadsheet software packages will enable the user to change or override the default settings of a worksheet.
   b. For example, it may be more convenient to have the default value format set for currency or dollars (to display dollar signs and two places to the right of the decimal point) than to have plain numbers displayed and have to continually change the formats.

D. Cells - The cell (review terms) is the point of intersection of a row and column. All data that is entered to a worksheet is stored in a cell and referred to by its cell address.

1. *Cell addresses* - Because the cell is the intersection of a row (which is usually numbered) and a column (which is usually referred to by a letter of the alphabet), the address of a cell is the column letter and the row number.

   a. For example, if the number 1234 is stored at the intersection of column B and row 4, the cell address of that number is B4.
   b. This is significant when using formulas, because within a formula you would refer to the cell address instead of the number itself.

2. *Contents* - The value, label, formula or function that is stored in a given cell. The cell contents may change.

E. *Formats* - The way the cell contents are displayed or how the contents look on the screen or when they are printed.

1. *Labels* - Characters, special symbols or numbers that will not be used in calculations.

   a. Labels are generally used to make the worksheet easier to read or understand.
   b. The only formatting done on a label is it's justification (see terms). Labels may be right-, left-, or center-justified.

2. *Values* - Numbers which may be used in mathematical calculations.

   a. Values are right-justified within the cell. The default format for values is usually "as-entered", "appropriate", or "general", meaning that the number will not automatically supply trailing zeroes to the right of the decimal place, commas, dollar or percent signs.
   b. Only numbers and decimal points may be entered as a value.
   c. Special commands, such as "Layout" or "Value Format" must be given to the spreadsheet so that numbers will be displayed with special characters, decimal places, and commas. Some examples follow:

      If the format is for commas, with two places to the right of the decimal point, and the

      value entered is 1576 the displayed value will be 1,576.00

      If the format is for currency (dollars), with two places to the right of the decimal point and the value entered is 276, the displayed value will be $276.00

value entered is 1765.3, the displayed value will be $1,765.30

value entered is 796.856, the displayed value will be $796.86

If the format is for percent, with no decimal places and the

value entered is .17, the displayed value will be 17%

value entered is .1796, the displayed value will be 18%

d. There are also special formats for displaying negative numbers. These will vary between spreadsheets.

V. **SREADSHEET APPLICATION** - In designing your own worksheets, it is often useful to follow a series of steps.

A. *Understand the problem* - Understand fully what you've been asked to accomplish. This is very important in terms of formulas. A subtotal, for example, is not the same thing as a grand total.

B. *Design a solution* - Before approaching the computer, have in mind what your worksheet will look like; for instance, whether to include labels, whether the identifying labels will be vertical or across the worksheet, and what the format for the various values will be.

C. *Enter the worksheet* - Using the spreadsheet software, enter the worksheet according to your design.

D. *Test and edit* - Manually check a few of the calculations to insure that cells are referenced properly. If there are errors, make corrections.

VI. **ERROR CONDITIONS**

A. *Cell Width* - As a result of a calculation, the width of the cell may not be sufficient to accomodate the length of the value.

1. For example, you may have summed a column of three dight numbers, with two places to the right of the decimal point. A number such as this would require a cell width of six (543.00).
2. If your cell is formatted for six positions and your addition results in a sum of several thousand, say 13,456.00, your cell will not hold this value, which would require nine positions.
3. The result will be some sort of error condition displayed. Many times, the cell will simply be displayed as ######, indicating that the cell isn't wide enough. The sum is still stored, but can't be displayed.
4. If this occurs, change the column width.

B. *Values/Label* - Two problems can occur when using values or labels.

1. The first may happen if you wish to use a special character as a label, but all computers may not cooperate.
    a. Before using a special symbol as a label, you must instruct the computer to do so.
    b. This is usually done by beginning the entry with the label indicator character. (For Appleworks and Lotus 123, the left-justified label indicator is the quote mark--".)

2. The second problem with labels and values occurs if you wish to use numbers as calculations, but entered them as labels. Doing so causes the numbers to be entered into the worksheet, but the computer thinks they are just labels and cannot do arithmetic with them.

C. *Formula transposition* - It is extremely important that your formulas refer to the proper cell addresses. By making a few "spot check" manual calculations, you can easily find formula errors.

VII. SPREADSHEET OPERATIONAL PROCEDURES

A. *Formulas* - By entering values into various cells and entering a formula that references those cells, we can get an immediate recalculation if the cell's values are changed.

1. The cell address is used in the formula as a variable value.

2. A variable is a storage location (cell) whose value may change.

3. Formulas may also contain constants, numbers within a formula whose values don't change. For example:

	A	**B**	**C**	**D**	**E**
1	**4**	**5**	**6**		**+A1+B1+C1+D1**
2					
3					

The formula is entered by beginning with a "+" sign. This tells the spreadsheet that a formula is forthcoming. The formula shown in cell E1 will add together the values stored in cells A1, B1, C1, and D1. Actually, the result of the calculation, or 15, would be displayed in cell E1. If we change the value of cell A1 to 10, the formula in E1 will immediately be recalculated to the new value 21. The formula doesn't have to be changed at all because it contained the cell address, not the value.

B. *Functions* - Formulas that have been built into the spreadsheet to save time and increase accuracy.

1. When adding a column of 12 numbers, the formula could look something like this:

    +A1+A2+S3+A4+A5+A6+A7+A8+A9+A10+A11+A12

    a. One common function found on most functions is the @SUM function. The @ symbol tells the spreadsheet that a function will follow.

b. For the above example, the @SUM function to add the column of 12 numbers would be:

@SUM(A1..A12)

The function means that the values between A1 and A12 inclusive will be summed or added together.

2. There are many built-in functions in most spreadsheets. Their type and complexity will vary with the different software packages.

C. *Recalculation*

1. Recalculation of worksheets is an automatic function of most spreadsheets.

   a. For most, it is the default setting.
   b. The spreadsheet will automatically recalculate the worksheet every time a change is made to it.

2. While editing a large worksheet, the recalculation setting will generally be changed to manual.

   a. When editing is completed , there will be a specified set of keystrokes to have the spreadsheet recalculate the worksheet.
   b. (Lotus 123 uses a function key. Appleworks uses OA-K).

D. *Column Width*

1. Often, especially with labels or very long numbers, the default setting for the column width isn't wide enough.

2. Check the manual for your software under "column width" to change it.

E. *Editing*

1. Most spreadsheet software packages will allow you to edit or change the contents of the cells without retyping the entire cell.

2. The keystrokes will vary greatly from package to package.

VIII. SREADSHEET SOFTWARE EVALUATION

A. *Maximum Worksheet Size* - Depending on the software package, the spreadsheet size will vary.

1. The variance in size usually has a direct relationship to the cost and complexity of the given software package.

2. Spreadsheet size will also depend upon the amount of available primary memory.

B. *Built-in Functions* - Functions refer to the formulas the spreadsheet has "built in" to it.

C. *Applications Differences* - Various applications require different functions and shreadsheet sizes.

1. *Scientific/Medical* - Utilize complex mathematical calculations, and, therefore, require spreadsheet software that has functions for statistical modeling. Many of these applications would also require a large worksheet size.

2. *Business/Accounting*

3. *Database Possibilities*- Some spreadsheet software packages come with a file-handling capability that is similar to a database.

    a. Increases the use of the software by expanding the applications.
    b. Enables the user to select specific rows or columns of data and print or manipulate it through identification of specific criterion.

D. *Ease-of-Use Features* - Features of software that make it "user friendly."

1. Menu-drive

2. Cell editing

3. Merging of files

4. Compatibility with other spreadsheet software packages.

5. Help-screens

6. Easy-to-read manuals

ELECTRONIC SPREADSHEET/LEARNING EXPERIENCE ONE

DIRECTIONS: Enter the following worksheet into the cell addresses shown. Type in the values, labels, and formulas exactly as they are given below. The filename for your worksheet will be EXER01.

	A	B	C	D	E
1	Supplies	Beg.Inv.	Used	On-Hand	
2					
3	Pencils	12	6	+B3-C3	
4	Pads	50	20	+B4-C4	
5	Paper Clips	15	10	+B5-C5	
6					
7					
8					

ELECTRONIC SPREADSHEET/LEARNING EXPERIENCE TWO

DIRECTIONS: Retrieve the worksheet EXER01. Make the following changes to the cells indicated:

C3	3
C4	15

Edit A3 to read Pen

Add the following:

A6	Post-Its
A7	Pencils
A8	Folders
A9	Erasers
B6	25
B7	30
B8	5
B9	16
C6	10
C7	15
C8	3
C9	10

Enter the same formula in Column D for rows 6 through 9 as was entered in cells D3 through D5.

Save the changed worksheet with filename EXER01A.

ELECTRONIC SPREADSHEET/ACTIVITY ONE

Case Study

DIRECTIONS: You are a purchasing agent for a local teen's clothing store. You have been given the exciting assignment of selecting and buying two new lines of clothing for the store. To do this, you will be going to the Apparel Mart in Dallas and you're to have an expense account! Otherwise, however, your salary is low, so it is extremely important that you remain within your budgeted expense allowance of $210 for two days. Your airline ticket is not included in this amount, as you've been given a round-trip ticket (not first-class!). In order to insure you can live within your budget, you prepare the following spreadsheet:

Expenses	Amount each	Total Amount
Hotel	$45.00	$90.00
Breakfast	$ 5.00	$10.00
Lunch	$ 8.00	$16.00
Dinner	$12.00	$36.00
Car Rental	$25.00	$50.00
	Grand Total	$202.00

Answer the following questions:

1. Will you be able to make the trip within the prescribed budget?

   ______________________________.

2. "What if" the hotel bill is $50.00 per night instead of $45.00?

   ______________________________.

3. How would you "build" the spreadsheet so that you could change the hotel bill amount and immediately see that result?

   ______________________________.

4. Why do you think she/he has three dinners listed?

   ______________________________.

Business Problems

DIRECTIONS: Indicate by placing a "Y" or "N" in the blank whether the described financial or business problems could best be solved using spreadsheet software.

____ 1. Preparing a five-year budget.

____ 2. Keeping a list of customer's names and addresses.

____ 3. Typing form letters.

____ 4. Calculating payroll.

____ 5. Tallying inventory figures.

____ 6. Identifying the economic effect of hiring a new employee.

____ 7. Scheduling vacations.

____ 8. Scheduling rooms.

____ 9. Calculating the amount of money needed to go on a date.

____ 10. Keeping school absentee records.

____ 11. Entering a business report.

____ 12. Maintaining and averaging student grades.

____ 13. Maintaining a birthday card list.

____ 14. Calculating and tracking salespersons' commission amounts.

____ 15. Tracking items donated to charity for income tax records.

ELECTRONIC SPREADSHEET/ACTIVITY THREE

DIRECTIONS: Template (to be entered and saved by the teacher - students will retrieve and enter the given data into the annotated cells). Change the column width to 15. Numeric format should be currency (dollars) with two places to the right of the decimal.

3	Expenses	Amount Each	Total Amount
4	Hotel	$45.00	$90.00
5	Breakfast	$ 5.00	$10.00
6	Lunch	$ 8.00	$16.00
7	Dinner	$12.00	$36.00
8	Car Rental	$25.00	$50.00
		Grand Total	$202.00

Students enter the following data:

Cell Address	Data
C4	45
C5	5
C6	8
C7	12
C8	25

**Teacher note:* Point out to students that it isn't necessary to enter (nor can they) the "$" or positions to the right of the decimal point.

ELECTRONIC SPREADSHEET/UNIT TEST

Part 1

DIRECTIONS: Circle the letter of the correct answer for each statement.

1. Raw facts, numbers, and characters entered into the computer for processing by some software are called:

   a. information
   b. data
   c. cell
   d. value

2. A(n) __________ is a list of options or commands from which the user of productivity software may select.

   a. command
   b. idea
   c. format
   d. menu

3. A named unit of data or information, usually stored on a diskette, is called a:

   a. file
   b. record
   c. field
   d. database

4. The position at the intersection of a row and column is called a:

   a. value
   b. label
   c. cell
   d. coordinate

5. A program that allows electronic calculation of interrelated columns and row of values is called:

   a. a word processor
   b. a spreadsheet package
   c. a spread data package
   d. a database package

6. A rectangular group of cells that can manipulated within a command or formula is called a:

   a. range
   b. function
   c. spreadsheet
   d. window

7. An alphanumeric stored within a cell that is used to identify the worksheet's contents and cannot be used in mathematical calculations is called a:

   a. character
   b. label

Part 1 (continued)

c. value
d. string

8. The portion of the worksheet that can be viewed on the computer screen is called a:

a. window
b. square
c. range
d. cell

9. The action the software will take if no other instructions are given is called the:

a. command
b. menu
c. default
d. format

10. Cursor control is:

a. using arrow keys to move the cursor.
b. using the function keys to change the cursor.
c. using the return/enter key to move the cursor.
d. changing the size of the window.

Part 2

DIRECTIONS: Circle the correct answer.

T F 1. A range is a rectangular group of cells that can be manipulated within a command or formula as a group.

T F 2. A function is a formula the user defines.

T F 3. A business application for a spreadsheet could be keeping a business calendar.

T F 4. All spreadsheet software has the same number of rows and columns.

T F 5. Preparing budgets is an example of an application of an electronic spreadsheet.

T F 6. If the contents of cell A7 is 4 and the contents of cell B7 is 5, the formula to add these two values together would be "+4+5" and is stored in cell C7.

T F 7. What-if analysis is a function of electronic spreadsheets that allows the user to change values and immediately see the results through recalculation.

T F 8. Worksheet retrieval is the act of placing the worksheet into secondary memory.

Part 2 (continued)

T F 9. Data is defined as processed information.

T F 10. A value is a number that may be used in calculations.

Part 3

DIRECTIONS: Answer the following as completely as possible.

1. What would be your diagnosis of a cell whose displayed contents was ########?

2. The problem defintion for a particular worksheet calls for two numbers, 150 and 200, to be added together and divided by the number 5. If 150 is the content of cell A1, 200 is stored in cell B1, and 5 is stored in cell C1, what formula would provide the proper result?

3. Name and briefly discuss one business application of an electronic software package.

4. Describe the meaning of the word "scrolling" as it relates to spreadsheet software.

5. What command is entered to start-up the spreadsheet software you are using? Is this software menu- or command-driven?

ELECTRONIC SPREADSHEET/ANSWER SHEET

ACTIVITY ONE

1. Yes
2. $2.00 over budget
3. Place a formula in the total amount column
4. Because she/he has to eat dinner on the night of her/his arrival.

ACTIVITY TWO

1.	Y	9.	Y
2.	N	10.	Y
3.	N	11.	Y
4.	Y	12.	Y
5.	Y	13.	N
6.	Y	14.	Y
7.	Y	15.	Y
8.	Y		

ACTIVITY THREE

To be evaluated to the satisfaction of the instructor.

UNIT TEST

Part 1

1.	b	6.	a
2.	d	7.	b
3.	a	8.	a
4.	c	9.	c
5.	b	10.	a

Part 2

1.	T	6.	T
2.	F	7.	T
3.	T	8.	F
4.	F	9.	F
5.	T	10.	T

Part 3

To be evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(6) and 75.87 (c)(1)(F)

The student will be provided the opportunity to identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.

OBJECTIVE: Demonstrate competency in using the touch method on the electronic calculator or the microcomputer keypad to complete business and personal financial applications.	MASTERY	NON MASTERY
1. Complete a timed performance evaluation of the problems using the touch method:		
A. Addition	______	______
B. Subtraction	______	______
C. Multiplication	______	______
D. Division	______	______
E. Decimal placement	______	______
F. Percentages	______	______
	______	______
	______	______

STUDENT NAME ________________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87 (a)6) and 75.87(c)(1)(F)

The student will be provided the opportunity to identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.

OBJECTIVE: Demonstrate the ability to maintain a checking account including a fundamental understanding of the terms associated with checking accounts.	MASTERY	NON MASTERY
1. Describe all facets of banking procedures relating to checking accounts.	______	______
2. Demonstrate the ability to prepare a deposit slip.	______	______
3. Demonstrate the ability to maintain a check register.	______	______
4. Demonstrate the ability to reconcile a bank statement.	______	______
	______	______
	______	______

STUDENT NAME ________________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(6) AND 75.87(c)(1)(F)

The student will be provided the opportunity to identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.

OBJECTIVE:	Demonstrate competency in computing gross and net pay and preparing payroll forms.	MASTERY	NON MASTERY
1.	Demonstrate the ability to compute gross pay and net pay.	______	______
2.	Complete employee time cards.	______	______
3.	Prepare employee's earnings records.	______	______
4.	Record information in the payroll register.	______	______
5.	Prepare payroll checks.	______	______
		______	______
		______	______

STUDENT NAME ________________________________

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(a)(3)

The student will be provided the opportunity to identify concepts and skills related to personal and business management by demonstrating basic knowledge and usage of business machines.

OBJECTIVE:	Identify and understand opportunities for business ownership, risk and profit motive factor, elements and advantages of the free enterprise system, and explain the role of small business in the free enterprise system.	MASTERY	NON MASTERY
1.	Identify necessary parts of an economic system and give an example of each economic part.	______	______
2.	Identify the decisions that must be made in an economic system.	______	______
3.	Identify the decision-makers in an economic system.	______	______
4.	Identify the major factors of a free enterprise economic system.	______	______
5.	Describe those things that keep our free enterprise system in balance.	______	______
		______	______
		______	______

STUDENT NAME ________________________________

FINANCIAL MANAGEMENT/CURRICULUM OUTLINE/ELECTRONIC CALCULATOR

UNIT OBJECTIVE: **EE 75.87(a)(6)** and **(c)(1)(F)** Identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.

LEARNING OBJECTIVE: Demonstrate competency in using the touch method on the electronic calculator or the microcomputer keypad to complete business and personal financial applications.

GENERALIZATION: Using the touch method on the electronic calculator often facilitates business and personal use.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. OPERATIONAL KEYS A. Addition B. Subtraction C. Multiplication D. Division E. Percentage F. Decimal places	1. Practice using the touch method, using workbook or software. 2. Compute problems in addition, subtraction, multiplication and division using the touch method. 3. Compute problems using the percentage key. 4. Compute problems using decimal placement.	1. Complete a timed performance evaluation of the following problems using the touch method: A. Addition B. Subtraction C. Multiplication D. Division E. Decimal placement F. Percentages
II. USING THE TOUCH METHOD		
III. PROBLEMS USING ALL OPERATIONAL KEYS		
IV. UNDERSTANDING BUSINESS AND PERSONAL FINANCIAL APPLICATIONS A. Checking account procedures B. Payroll procedures C. Credit, loan and banking institutions		

FINANCIAL MANAGEMENT/CURRICULUM OUTLINE/BANKING PROCEDURES

UNIT OBJECTIVE: EE 75.87(a)(6) and (c)(1)(F) Identify concepts and skills related to personal and business management by demonstrating basic knowledge and usage of business machines.

LEARNING OBJECTIVE: Demonstrate the ability to maintain a checking account including a fundamental understanding of the terms associated with checking accounts.

GENERALIZATION: Maintaining and reconciling a checking account are skills necessary for both personal and business management.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. CHECKING PROCEDURES TERMINOLOGY	1. Prepare deposit slips, checks and check register, given specific instructions.	1. Identify and describe all facets of maintaining a checking account.
II. MAKING A DEPOSIT A. Preparing cash for deposit B. Preparing checks for deposit C. Preparing deposit slip	2. Upon receipt of a "statement," reconcile the account.	2. Demonstrate ability to perform the following: A. Prepare a deposit slip B. Maintain a check register C. Reconcile a bank statement
III. PREPARING CHECKS A. Writing checks B. Voiding a check		
IV. RECONCILING A BANK STATEMENT A. Information contained on the bank statement B. Steps in reconciling a bank statement C. Finding balancing errors		
V. MAINTAINING A CANCELED CHECK FILE		

FINANCIAL MANAGEMENT/CURRICULUM OUTLINE/PAYROLL PROCEDURES

UNIT OBJECTIVE: **EE 75.87(a)6 and (c)(1)(F)** Identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.

LEARNING OBJECTIVE: Demonstrate competency in computing gross and net pay and preparing payroll forms.

GENERALIZATION: Payroll preparation and understanding is essential for any employee, both on the job and in understanding an individual's own payroll information.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TERMINOLOGY	1. Demonstrate the ability to:	1. Match terms to their correct definitions.
II. GENERAL PAYROLL INFORMATION	A. Compute gross pay and net pay	2. Name and define the two categories of employees.
A. Employees	B. Complete employee time cards	
1. Salaried employees	C. Prepare employee's earnings records	
2. Hourly employees	D. Record information in the payroll register	3. Name the two types of payroll deductions.
B. Payroll deductions	E. Prepare payroll checks	4. List the two methods of preparing payroll.
1. Involuntary deductions		
a. Federal Insurance Compensation Act (FICA)		
b. Federal income tax		
c. State and/or local taxes		
2. Voluntary deductions		
a. Health insurance		
b. Group life insurance		
c. Disability insurance		
d. Savings bonds		
e. Union dues		
f. Deposits to savings account		
C. Preparing payroll		
1. Manual system		
2. Computer system		

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
III. PAYROLL FORMS		
A. Types of payroll forms		
1. Employee's Exemption Certificate (W-4 form)		
2. Employee's time card		
3. Employee's earnings record		
4. Payroll register		
5. Payroll check		
6. Wage and tax statement (W-2 form)		
B. Preparing payroll forms		
1. Employee's earnings record		
2. Payroll register		
3. Payroll check		

FINANCIAL MANAGEMENT/CURRICULUM OUTLINE/ENTREPRENEURSHIP

UNIT OBJECTIVE: **EE 75.87(a)(6)** and **(c)(1)(F)** Identify concepts and skills related to personal and business management and demonstrate basic knowledge and usage of business machines.
EE 75.87(a)(3) Identify and understand concepts and skills associated with entrepreneurship.

LEARNING OBJECTIVE: Identify and understand opportunities for business ownership, risk and profit motive factor, elements and advantages of the free enterprise system, and explain the role of small business in the free enterprise system.

GENERALIZATION: Knowledge of the elements and advantages of a free enterprise system is helpful in becoming an effective citizen in our society today.

CONTENT OUTLINE

I. TERMINOLOGY OF ENTREPRENEURSHIP

II. OPPORTUNITIES FOR BUSINESS OWNERSHIP

III. ROLE OF THE ENTREPRENEUR

IV. RISKS INVOLVED IN STARTING A BUSINESS

  A. Financial
  B. Failure rate
  C. Career
  D. Personal

V. TYPES OF ECONOMIC SYSTEMS

  A. Capitalistic
  B. Socialistic
  C. Communistic

LEARNING EXPERIENCE

1. Discuss terms and definitions associated with entrepreneurship.
2. Recognize opportunities and options for business ownership.
3. View a film on the free enterprise system.
4. Hear a guest speaker who is the owner of a small business in the community.
5. Complete activity worksheets on the following:

   A. Starting a business
   B. Working in different types of economic systems
   C. Creating your own enterprise

EVALUATION CRITERIA

1. Identify necessary parts of an economic system and give an example of each economic part.
2. Identify the decisions that must be made in an economic system.
3. Identify the decision-makers in an economic system.
4. Match the major economic systems in operation today with the statements which define the systems.
5. Identify the major factors of a free enterprise economic system.
6. Describe those things that keep our free enterprise system in balance.

FINANCIAL MANAGEMENT/CURRICULUM OUTLINE/ENTREPRENEURSHIP (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
VI. AMERICAN ECONOMIC SYSTEM		
A. Ownership of private property B. Profit C. Rights of the people D. Competition E. Free market		
VII. BALANCE IN THE FREE ENTERPRISE SYSTEM		
A. Law of supply and demand B. Changes in the economy C. Employment		

FINANCIAL MANAGEMENT/RESOURCES

TEXTBOOKS

THE ADMINISTRATIVE SECRETARY
Gregg/McGraw-Hill Book Co.

BANKING AND CREDIT OCCUPATIONS
Prentice-Hall Media

CENTURY 21 ACCOUNTING
South-Western Publishing Co.

CLERICAL PAYROLL PROCEDURES
South-Western Publishing Co.

DEVELOPING BOOKKEEPING SKILLS
AMSCO School Publications, Inc.

ENTREPRENEURSHIP AND VENTURE MANAGEMENT
Textbook
Charles E. Merrill Publishing Co.

GENERAL OFFICE PROCEDURES FOR COLLEGES, 7th ed.
South-Western Publishing Co.

HOW SMALLER COMPANIES ARE TACKLING THEIR FINANCIAL PROBLEMS
B. Munder
Management Review
January, 1975

HOW TO START YOUR OWN BUSINESS
William D. Putt
MIT Press

INTRODUCTORY GUIDE TO ENTREPRENEURSHIP
Occupational Curriculum Laboratory
East Texas State University

KEY BUSINESS RATIOS
Dunn and Bradstreet, Inc.

OFFICE MACHINES
text, workbok
Houghton-Mifflin Publishing Co.

OFFICE MACHINES COURSE
South-Western Publishing Co.

OFFICE PROCEDURES, 2nd ed.
MPC Educational Publishers
Milady Publishing Corp.

SECRETARIAL OFFICE PROCEDURES, COLLEGE SERIES
Gregg/McGraw-Hill Book Co

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES, 7th ed.
South-Western Publishing Co.

SMALL BUSINESS MANAGEMENT
Delmar Publishers

PRACTICE SETS

ACTIVITIES HANDBOOK FOR TEACHING WITH THE HAND-HELD CALCULATOR
Allyn and Bacon

BANK RECONCILIATION PROJECTS
Workbook
Glencoe Publishing Co.

CAPITOL AUDITING SERVICE: A CALCULATOR SIMULATION
Houghton-Mifflin Publishing Co.

DISCOVERING ENTREPRENEURSHIP
filmstrips and cassettes
South-Western Publishing Co.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual package
Occupational Curriculum Laboratory
East Texas State University

RPM UNLIMITED: A BUSINESS MACHINES PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

SECURITY FIRST BANK--A BANKING CUSTOMER SIMULATION
South-Western Publishing Co.

SET OF ENTREPRENEURSHIP MODULES
Ohio State University
Instruction Materials Laboratory

STANDARD PAYROLL PROJECT
Workbook
Glencoe Publishing Co.

SOFTWARE

BANKING--MICROCOMPUTER JOB SIMULATOR SERIES
1 disk, student manual and documents needed
Apple II or IIe
TRS-80 Model III

MICROCOMPUTER KEYPAD OPERATIONS
1 disk and documentation for: Apple, TRS-80 Model III or IV, IBM-PC
Career Aids, Inc.

I. TERMINOLOGY

A. *Memory key* -- tells the calculator to set aside and remember for later use (store in memory) a number of numbers. When a number is stored in memory, an "M" appears in the upper left corner of the display.

1. *Memory plus key* -- identified as "M+"; tells the calculator to enter the number just indexed into memory or to add the number to what is already in memory.

2. *Memory minus key* -- identified by "M-"; tells the calculator to store the number just indexed as to negative amount or to subtract the number from what is already in memory.

3. *Memory recall key* -- identified by "MR"; tells the calculator to show the amount that is stored in memory.

4. *Memory clear key* -- identified by "MC"; tells the calculator to remove (clear) all that has been stored in memory.
(NOTE: The numbers in memory or the computations performed in memory do not affect the other numbers in the register.)

B. *Operational keys* -- the keys of the electronic calculator that perform various functions, such as addition, subtraction, multiplication, division, total key, etc.

C. *Percent* -- identified by "%"; tells the calculator to compute the percent just indexed.

D. *Prorate*--to divide or assess proportionally.

E. *Register* -- the inner mechanisms of the calculator where the computation is performed.

F. *Ten-key keyboard* -- a keyboard arrangement in which there are ten numeric keys (1-9) arranged in rows of three keys each, with an additional key or bar (0) at the bottom of the last row. In addition to the numeric keys, there are various operational keys.

G. *Touch method of operation* -- a means of operating a ten-key keyboard by touch rather than by sight. Fingers remain "on base" at home row, except when striking other keys.

II. OPERATIONAL KEYS

A. *Plus key* -- identified by "+"; used in addition.

B. *Minus key* -- identified by "-"; used in subtraction.

C. *Multiplication key* -- identified by "x"; used in multiplication.

D. *Division key* -- identified by ":"; used in division.

E. *Equals key* -- identified by "="; tells the calculator to complete a computation and show the answer.

F. *Total key* -- identified by "T" or by "*"; tells the calculator to show the total of a calculation. Clears the register.

G. *Clear key* -- identified by "C"; removes (clears) information from the register and readies the calculator to accept a new problem.

III. PREPARATIONS FOR USING THE ELECTRONIC CALCULATOR

A. Clear work space of unnecessary items

B. Place the calculator to your right; working materials (workbook or paper, pencil)to your left

C. Sit straight; feet flat on floor

D. Curve your index, middle, and ring fingers over the home row keys

(**NOTE**: Correct posture is important for your comfort and to ensure speed and accuracy.)

IV. USING THE TOUCH METHOD

A. Use these fingers to operate the home row keys:

1. *Index finger* - 4 key

2. *Middle finger* - 5 key

3. *Ring finger* - 6 key

B. Use the "home row" fingers to stroke the following keys:

1. *Index finger*
   a. Reach up from the 4 key to strike the 7 key
   b. Reach down from the 4 key to strike the 1 key

2. *Middle finger*
   a. Reach up from the 5 key to strike the 8 key
   b. Reach down from the 5 key to strike the 2 key

3. *Ring finger*
   a. Reach up from the 6 key to strike the 9 key
   b. Reach down from the 6 key to strike the 3 key

C. Use the *thumb* to strike the 0 key

D. Use the *little finger* to strike the operational keys to the right of the numeric keyboard

E. Use the *index finger* to strike the operational keys to the left of the numeric keyboard

I. TERMINOLOGY

A. *ABA numbers* -- American Bankers Association code numbers printed on checks and deposit slips.

B. *Bank statement* -- a printed record of all transactions that have taken place in the checking account during the month.

C. *Blank endorsement* -- an endorsement consisting solely of the signature of the person to whom the check is written.

D. *Canceled check* -- a check that has been paid by the bank. The check is then returned to the account holder with the bank statement.

E. *Check-writing machine* -- a machine used in writing checks that imprints the amount in a distinct type and perforates the paper to insure against fraudulent alteration of the check.

F. *Clearing a check* -- the process that takes place from the time the check is deposited until it is paid.

G. *Deposit* -- money put into a bank account.

H. *Deposits in transit* -- deposits that were recorded on the account holder's check register or stub, but were not processed at the bank in time to be included on the bank statement.

I. *Deposit slip* -- a form the depositor fills out showing the amounts and types of money to be deposited in a bank account.

J. *Endorsement in full* -- an endorsement used for transferring a check to another person or company.

K. *Outstanding checks* -- checks which have been written and recorded on the register or check stub, but which have not cleared the bank in time to be included on the bank statement.

L. *Reconciling a bank statement* -- another way of saying "balancing the checkbook." Process of getting the checkbook balance and the bank's balance to match.

M. *Restrictive endorsement* -- an endorsement which restricts the use of the check once it is endorsed. Insures that the check can be deposited only to the account of the person or company whose identification appears in the endorsement.

N. *Voiding a check* -- tearing up a check that has been written incorrectly.

II. MAKING A DEPOSIT

A. *Preparing cash for deposit*

1. Obtain money wrappers for both coins and bills from the bank

a. Coin wrappers

(1) Sort coins into stacks of pennies, nickels, etc.
(2) Stack the number of coins in a coin wrapper that will equal the amount shown on the outside of the wrapper.
(3) Write or stamp the name of the depositor on each roll, for identification in case of an error.

b. Bill wrappers

(1) Lay each bill of like denomination face up, with the picture on each bill facing the same direction.
(2) Count out the number of bills that equals the amount printed on the wrapper.
(3) Place the money wrapper tightly around the bills.
(4) Print the name of the person or company holding the account on the outside of the money wrapper.

2. Extra bills of each denomination that cannot be placed in a wrapper should be laid down in the same manner as those that were wrapped. All extra bills should be stacked together, with bills of smallest denomination on top, largest denomination on bottom.

3. All bills, wrapped and loose, should be bound together with an elastic band.

B. *Preparing checks for deposit*

1. *Inspect* each check to insure that it has been written correctly.

a. Check has been made payable to the proper person or firm.
b. Amount written in figures agrees with that spelled in words.
c. Check has been signed.

2. *Endorse* the check

a. Checks must be endorsed in order to be deposited.

(1) Endorsement may be made with a stamp or manually.
(2) Endorsement is stamped or written on the left end of the backside of the check (bottom side down).

b. Types of endorsements

(1) Restrictive endorsement

(a) The words "For Deposit Only" should be written or printed on the first line of the endorsement.
(b) The signature and/or account number of the person or company that has the account into which the check is being deposited should be entered on lines two and three.

(2) Blank endorsement

(a) Endorser's name is signed on the back of check.
(b) Check is payable to anyone who tries to cash it.
(c) Endorsement should be used only when one is at the bank where the check is to be cashed or deposited.

(3) Endorsement in full

(a) "Pay to the order of" should be written or printed on the first line of the endorsement.

(b) Name of the person or company to whom the check is given is on line two.
(c) Signature of the person to whom the check is made payable, or the signature of the person authorized to use the account, is entered on the third line.

C. *Preparing the deposit slip*

1. *Record* the account number.
   a. Use personalized deposit slips with the account number printed on the slip, if available.
   b. Record the account number in the appropriate spaces if using a general deposit slip provided at the bank.

2. Always use the *current date*.

3. Record the *currency* to be deposited.
   a. List the total amount of the bills being deposited.
   b. List dollars to the left of the vertical line, with zeros in the column allotted for cents.

4. List the total amount of the *coins* being deposited, in dollars and cents.

5. List each *check* separately.
   a. Record either the ABA number on the check or the name of the person or company that wrote the check.
   b. Record the exact amount of the check in dollars and cents.
   c. List additional checks on the back of the deposit slip.

6. Record the total amount of the currency, coins, and checks being deposited.

7. *Deduct cash received*.
   a. List the amount of any cash to be received in the "less cash received" column.
   b. Subtract the amount from the total amount of the deposit.
   c. Record the adjusted total of the deposit below the cash amount. This is the actual amount of the deposit.

   (**NOTE:** The depositor must sign the deposit slip in the space provided, if cash is to be received.)

8. *Record* the *date* and the *amount* of the deposit in the check register or on the check stub. Adjust the checkbook balance.

III. PREPARING CHECKS

(**NOTE:** Checks may be handwritten, typed on the typewriter, or prepared on a special check writing machine.)

A. *Steps for writing checks*

1. Enter the check number, date, payee, and the extension figures in the check register or on the check stub. This provides a record of all checks written against

the account and of all deposits made to the account.

2. If the checks are not prenumbered, enter the next consecutive number for the check in the appropriate space.

3. Record the current date in the space labeled "Date."

4. On the line labeled "Pay to the order of," record the name of the payee, the person or company to whom the check is being written. Double check the spelling of the payee's name before writing anything in this space.

5. At the end of that line, insert the amount of the check in figures.

   a. Can be written using figures for the dollar amount followed by a decimal point and the cents figure.
   b. Can be written using figures for the dollar amount and a fraction (cents over the number 100) for the cents figure.
   c. If the amount of the check is less than one dollar, circle the amount.

6. On the next blank line, insert the amount of the check by spelling out the dollar amount in words and by using a fraction for any additional cents.

   a. Begin at the extreme left of the space provided to prevent the insertion of additional words.
   b. Separate the dollar and the cents amounts by the word "and."
   c. If the check is for an even dollar amount, write 00/100 or no/100 for the cents amount.
   d. Draw a line from the fraction to "Dollars" to fill the empty space.
   e. If the amount of the check is less than one dollar, precede the fraction that indicates cents with the word "only," and cover over the word "Dollars" that appears at the end of the line.
   f. Check to be sure that the amount written in figures is the same as the amount written in words. If there is an error and the amount entered in figures and the amount written in words are different, the amount shown in words is the amount for which the check will be cashed.

7. On the line in the lower left corner of the check, record the purpose for which the check is being written.

8. If the account number is not printed on the check, record that number in the appropriate spaces.

9. Sign the check on the line in the lower right corner.

   a. Sign your name exactly as it is shown on the signature card at the bank.
   b. Be sure that the signature is that of either the account holder (personal name) or a person authorized to write checks for the company.

B. *Voiding a check*

1. Never erase or cross out a mistake on a check.

2. Tear up the check and start a new one.

3. Enter the check number and date in the register, and write VOID in the column that describes the transaction.

IV. RECONCILING A BANK STATEMENT

A. *Information contained on the bank statement includes:*

1. All checks and deposits that have been processed since the last statement.
2. The date the transaction was recorded at the bank.
3. The balance after each transaction.
4. Any service charges incurred.
5. A form on the back of the statement to aid in balancing the account.

B. *Reconciling a bank statement*

1. Compare the amount shown on each canceled check with the amount shown on the bank statement.
    a. Do not change the order in which checks are returned by the bank. The order in which the canceled checks are returned with the bank statement will correspond to the order in which they are listed on the bank statement.
    b. Place a check mark next to each figure on the bank statement that matches the amount shown on the canceled check.
2. Compare the deposits listed on the bank statement with those listed in the check register or on check stubs.
    a. Place check marks both on the bank statement and on the register or stub for each deposit.
    b. Make a list of all deposits that have been made but have not been credited to the account (deposits in transit).
3. Arrange the canceled checks in numeric order and compare them with the stubs or the register.
    a. Place a check mark next to each check listed in the register or on the stubs for which there is a canceled check.
    b. Make a list of all checks that have been written but have not yet been paid by the bank on this statement (outstanding checks). List the check number and the amount.
4. Balance the checkbook on the form provided by the bank or on plain paper by following the procedure below.
    a. Record the amount of the bank balance which is shown on the statement.
    b. Add any deposits which have been made but are not shown on the statement.
    c. Total the amounts of the outstanding checks and subtract this figure from the sum of the bank balance and uncredited deposits.
    d. Record the adjusted bank balance, the figure obtained in step c. above. The adjusted bank balance should agree with the balance in the checkbook.
5. Double-check the adjusted bank balance.
    a. Record the balance shown in the checkbook.
    b. Subtract any activity or service charge noted on the bank statement.

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c. After subtotaling the checkbook balance minus any activity charge, subtract any additional bank charges for such items as new checks, stop payment orders, etc., from that figure.

d. Compare the adjusted checkbook balance with the balance shown on the bank statement.

6. Compare the figures found after following this process. If the checkbook is "balanced," the figures will be the same. The last figure recorded in the checkbook will also match these two figures.

C. *Finding balancing errors*

1. Has the amount of each check on the checkbook stubs or in the check register been entered correctly?

2. Are the amounts of the deposits entered on the checkbook stubs or in the register the same as those shown on the statement?

3. Have all checks been deducted from the check stubs or from the register?

4. Have all bank charges been deducted from the check stubs or from the register?

5. Has the correct balance been carried forward from one checkbook stub to another or from one page in the register to another?

6. Are all additions and subtractions in the register or on the check stubs correct?

V. MAINTAINING A CANCELED CHECK FILE

A. *File canceled checks*, *bank statement*, and *reconciliation* form *together* for future reference.

B. Use a *separate file* for *each month* to keep records in order and for easier reference.

C. *Retain* these financial records for *seven years* or for the length of time determined by company policy.

I. TERMINOLOGY

A. *Employee's Withholding Exemption Certificate* -- a form used to indicate marital status and number of exemptions for use in determining payroll deductions.

B. *Federal Insurance Compensation Act (FICA)* -- commonly referred to as the Social Security tax which provides pensions for retired persons, provides survivor benefits for dependents of insured workers that are disabled or dead, and provides hospital and medical insurance to those persons over the age of 65.

C. *Gross pay* -- the total amount earned by an employee before taxes or other deductions are taken from it.

D. *Hourly employees* -- persons paid wages according to the number of hours they work each week; paid a certain amount for each hour.

E. *Net pay* -- an individual's earnings after deductions have been taken out.

F. *Payroll register* -- a form used to summarize the payroll information for all employees.

G. *Salaried employees* -- persons paid a set amount of money each week or month.

H. *Time card* -- a form used for recording the hours an employee works.

I. *W-4 form* -- another term for employee's Withholding Exemption Certificate.

II. GENERAL PAYROLL INFORMATION

A. *Categories of employees*

1. *Salaried employees*
   - a. Paid a set amount of money each week or month.
   - b. Mainly executives and professional employees.
   - c. Not usually paid for overtime.
2. *Hourly employees*
   - a. Paid according to the number of hours worked each week or month.
   - b. Normally laborers and production employees.
   - c. Usually paid time and one-half for any hours of work over forty hours in one week.

B. *Payroll deductions*

1. *Involuntary deductions*
   - a. Federal Insurance Compensation Act (FICA)
     - (1) Sometimes referred to as Social Security tax.
     - (2) Provides pension for retired persons, survivor benefits for dependents of insured workers that are disabled or dead, and hospital and medical

insurance to those persons over the age of 65.

(3) Based upon a percentage of a predetermined maximum salary.

(**NOTE:** If the employee does not earn the maximum salary, a percentage of the total earnings is deducted.)

(4) Discontinued when the maximum salary has been earned by an employee in one calendar year.

b. Federal income tax

(1) Sometimes referred to as withholding tax.
(2) Based upon a person's earnings and the number of exemptions claimed.
(3) Determined by using a table provided by the Internal Revenue Service.

c. State and/or local taxes

(1) Imposed by some states and cities on a person's income.
(2) Determined by using a table provided by the state or city.

2. *Voluntary deductions*

(**NOTE:** Most employees elect to have other deductions taken from their gross pay, including any of the following:)

a. Health and hospitalization insurance
b. Group life insurance
c. Disability insurance
d. Savings bonds
e. Union dues
f. Deposits to savings account

C. *Preparing payroll*

1. *Manual system*

a. Each step is performed by hand with some use of typewriters, adding machines, and calculators.
b. Information is computed and recorded on one form at a time.
c. Used mainly in small businesses.

2. *Computer system*

a. Payroll information is entered into the computer for processing and storage.
b. Magnetic tape, punched cards or tape are used to permanently store information.
c. Saves time, effort, and space when preparing the payroll for a business.

III. PAYROLL FORMS

A. *Types*

1. *Employee's Exemption Certificate* (W-4 form).

a. Completed on all employees and filed with the employer.
b. Contains the following information:

(1) Name and address
(2) Social Security number
(3) Marital status
(4) Number of exemptions

c. Used to determine the amount of FICA to be withheld from an employee's gross pay.

2. *Employee's time card*

    a. Usually completed by hourly employees.

    (**NOTE:** Some employers may require salaried employees to complete time cards.)

    b. Contains the following information:

        (1) Name of employee
        (2) Pay period
        (3) Wage or salary
        (4) Number of hours worked

    c. Used as a basis for computing an employee's wages for a pay period.

3. *Employee's earnings record*

    a. Completed by the employer for each employee.
    b. Contains the following information:

        (1) Employee's name and address
        (2) Social Security number
        (3) Pay period
        (4) Wages and withholdings

    c. Used to prepare reports of earnings and withholdings to government agencies.

4. *Payroll register*

    a. Contains a summary of all employees' earnings records for a given pay period.
    b. Provides the employer with a permanent record of all wages and salaries paid.

5. *Payroll check*

    a. Prepared for each employee.
    b. Contains two parts:

        (1) The check which includes the check number, date, name of payee, amount of check, and signature of payer.
        (2) The voucher (stub) which includes the name of the employee, amount of pay earned, deductions, and a summary of earnings and deductions for the year.

6. *Wage and tax statement* (W-2 form)

    a. Prepared by the employer at the end of the calendar year for each employee.
    b. Shows the amount of money earned for the year, withholdings, and Social Security contribution.
    c. Attached to the employee's income tax return at the time of filing.

B. *Preparing payroll forms*

1. *Employee's earnings record*

    a. Complete a form for each employee.
    b. Enter the personal information for the employee obtained from:

        (1) W-4 form

(2) Employee's time card

c. Compute the gross pay for hourly employees.

(1) Total the hours recorded on the time card.
(2) Subtract time for absence or tardiness.

(**NOTE:** Do not deduct time if sick leave, vacation time, paid holidays, etc. are taken.)

(3) Multiply the total regular hours worked by the rate of pay.
(4) Multiply the overtime hours by the overtime rate.
(5) Add the two totals together to find the gross pay.
(6) Enter the gross pay on the earnings records.

d. Compute the FICA deductions for all employees.

(1) Multiply the employee's gross pay by the percentage required by law.

EXAMPLE: $1888. gross pay x 6.65% = $1888.02 x .0665 = $125.55 FICA

(2) Enter the FICA deduction on the earnings record.

e. Determine the Federal income tax deduction.

(1) Use the table provided by the Internal Revenue Service.

(**NOTE:** Separate tables are provided for use in determining the deduction for single, married, or head of household.)

(2) Read down the income column until you find the appropriate gross income range.
(3) Read across to the column headed by the total number of exemptions claimed by the individual.
(4) Enter the amount shown where the two lines meet on the employee's earnings record.

f. Record other deductions.

(1) Compute state and/or local taxes, if applicable, and enter on the employee's earnings record.
(2) Record voluntary deductions in the appropriate spaces on the earnings record.

g. Enter the summary of entries at the end of each quarter on the bottom portion of the record.

2. *Payroll register*

a. Enter the pay period date.
b. Transfer the payroll information from each employee's earnings record to the appropriate spaces on the register.
c. Total the deductions for each employee and enter in the appropriate space.
d. Compute the net pay.

(1) Subtract the total deductions from the gross pay.
(2) Enter the net pay amount in the space provided.
(3) Double check each entry for accuracy.

3. *Payroll check*

   a. Prepare a payroll check for each employee.
   b. Enter the following information on the check portion of the payroll check:
      (1) Check number and date
      (2) Name of payee
      (3) Amount of check
      (4) Signature of payer
   c. Transfer the information from the payroll register to the voucher portion of the payroll check.

I. TERMINOLOGY

A. *Business* -- a place where products and services are bought and sold.

B. *Competition* -- struggling against another person or business in order to make a better product or service at a lower price.

C. *Economic* - having to do with meeting a person's needs; for example, food and a place to live.

D. *Economic system* -- how a government goes about meeting the economic needs of the country.

E. *Enterprise* -- a business.

F. *Entrepreneur* -- a person who starts or buys a business.

G. *Entrepreneurship* -- a small business started by one or more people.

H. *Free enterprise economic system* -- an economic system in which the people, not the government, own the businesses.

I. *Independently owned* -- not part of another business.

J. *Industrial* -- businesses that deal with machines rather than with the land.

K. *Market place* -- where products and services are bought and sold.

L. *Monopoly* -- business that is so dominant within its field that there is no competition for the products and services that it sells.

M. *Natural resources* -- anything that is not man-made and which is found in the environment, such as land, trees, water, and minerals.

N. *Product* -- that which a business sells, such as car parts or office supplies.

O. *Profit* -- the money left after all the bills have been paid.

P. *SBA* -- Small Business Administration.

Q. *Services* -- that which is done for another person, such as cleaning houses or typing.

R. *Small business* -- a business that is independently owned, independently managed, and not dominant in its field.

S. *Small enterprise* -- a small business.

T. *Sole proprietor* -- a person who is the only owner of a business.

U. *Stockholder* -- a person who owns part of a business but who may not be involved in it on a day-to-day basis.

II. OPPORTUNITIES FOR BUSINESS OWNERSHIP

A. The *government uses* the products and services of entrepreneurs.

B. The *government provides* services for entrepreneurs to use.

  1. Highways
  2. Law enforcement

C. The *government protects* the *people* who buy goods and services.

  1. Ensure the products and services are safe.
  2. Provide information to people.

D. The *government protects free enterprise*.

E. Many people in America work in *small businesses*.

  1. Ninety-seven percent of the businesses in America are small businesses.
  2. One in eight people is self-employed.
  3. Fifty-six percent of the people work for small businesses.

III. ENTREPRENEURS HELP AMERICA GROW

A. Bring *new products* into the market place.

B. *Create competition.*

  1. Helps make products and services better.
  2. Helps create new and better products and services.

C. *Help economy grow.*

D. *Free enterprise* enables *anyone* to become an entrepreneur.

  1. Allows people to use their abilities.
  2. Allows people to set high economic goals.

IV. RISKS INVOLVED IN STARTING A BUSINESS

A. *Financial risk*

  1. Often requires investing personal savings.
  2. Over 70 percent of all bankruptcies in business involve businesses with less than

$100,000 in liabilities.

B. *Failure risk*

1. Fifty percent of all new businesses fail within the first two years of operation.
2. Seventy percent of all new businesses fail within five years.

C. *Career risk*

1. Often required to quit one job to start a new business.
2. If the business does not succeed, it may be difficult to return to the other occupation or obtain another job.

D. *Personal risk*

1. Time is spent away from the family.
2. There is less time for social activities.

V. TYPES OF ECONOMIC SYSTEMS

A. *Capitalistic*

(NOTE: Free enterprise system)

EXAMPLE: United States

1. Based on private ownership.
2. Allows competition.
3. Goods produced for the purpose of gaining profit.
4. Works only in a democracy.

B. *Socialistic*

EXAMPLE: Great Britain

1. Depends heavily on government to make economic decisions.
2. Public interest is more important than private profit.
3. Government controls major industries and resources.

   EXAMPLE: The government medicine and medical services in England.

4. Allows some private ownership.
5. Democracy can be a part of a socialist economy.

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C. *Communistic*

EXAMPLE: Russia, Red China

1. All production owned by the government.
2. Government ruled by a single party.
3. Allows no private ownership.
4. Democracy cannot be a part of a communistic economy.

(**NOTE:** Communism is also considered a political system.)

VI. AMERICAN ECONOMIC SYSTEM

A. *Ownership of private property*

1. A legal right to own personal property.
2. The right to own businesses.
3. The right to own natural resources.

B. *Profit*

1. Individuals want to use their resources to earn money.
2. Profit leads to economic development.
3. Profit can make producers want new jobs.
4. Profit can make producers want to do their jobs well.

C. *Rights of the people*

1. To develop business.
2. To run the business.
3. To operate in an open economy.
4. To make a profit from the business.

(**NOTE:** Free enterprise is the basis of a capitalistic economic system. However, exceptions to these rights can be made when goods and services are critical to the welfare of the nation.)

D. *Competition*

1. The development of new or improved goods and services.
2. Efficient use of resources.
3. New jobs

E. *Free Market*

1. The market is not under government control.
2. People may produce what they think they can sell.
3. People may make profits, but also must accept losses that may occur.
4. The consumer has a broad selection from which to choose.

VII. BALANCE IN THE FREE ENTERPRISE SYSTEM

A. *Law of supply and demand*

1. Determines how much of the goods and services are produced.
2. Determines how goods and services are distributed.
3. Affects the price of goods and services.
4. Affects employment.

B. *Changes in our economy*

1. How people spend their money
2. Creation of new technologies to improve goods and services
3. Amount of money available for investment
4. Crop failures
5. Wars
6. Confidence of the people in the economy

   (**NOTE:** Confidence in the economy is shown when spending is up because people feel good about the future.

C. *Employment*

1. Natural growth and development cause major shifts in employment.
2. Changes in demand for goods and services result in unemployment for various periods of time.
3. New jobs are caused by shifts in the demand for goods and services.
4. The work force must continually adjust to these changes in demand.
5. Business, government, and labor organizations help people adjust to changing job conditions.

   (**NOTE:** Employment is the key factor in a balanced economy.)

FINANCIAL MANAGEMENT/ELECTRONIC CALCULATOR/ACTIVITY ONE

ADDITION

DIRECTIONS: Following the procedure given below, complete each problem using the touch method.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 0.
3. Place fingers in home row position.
4. Index the first number.
5. Depress the plus key.
6. Repeat steps 4 and 5 for all remaining numbers.
7. Depress the total key (on some calculators, the equals key).

   (NOTE: Some calculators show a running total while the problem is being completed. If your machine does this, simply record the amount shown after step 6.)

8. Record the total on your activity sheet.

Addition problems

A. Home Row - 4, 5, 6

1.	2.	3.	4.	5.
465	645	564	554	654
664	564	645	466	645
546	456	456	654	564
645	546	546	465	456
654	565	645	546	546

B. Top Row - 7, 8, 9

1.	2.	3.	4.	5.
744	696	747	598	847
789	669	696	876	869
879	477	845	945	679
474	585	956	465	596
978	885	696	789	647

C. Bottom Row - 1, 2, 3, and 0

1.	2.	3.	4.	5.
414	632	230	221	310
123	410	961	532	804
321	320	703	612	520
302	132	592	406	321
103	103	863	300	366

D. All Rows

1.	2.	3.	4.	5.
645	554	956	132	703
477	885	879	696	669
260	679	546	598	425
598	221	132	703	834
356	300	310	465	186

6.	7.	8.	9.	10.
789	120	456	450	697
256	334	417	189	827
963	952	809	321	743
159	278	510	789	564
456	627	362	884	961

SUBTRACTION

DIRECTIONS: Many electronic calculators differ in the procedure for entering and completing subtraction problems. Consult the operator's manual to learn the correct subtraction procedure for your model, and complete each problem below.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 0.
3. Place fingers in home row position.
4. Proceed to index and enter numbers and depress necessary operation(s) key(s) as instructed in your operator's manual.
5. Record the answers on your activity sheet. Show credit balances with a minus sign or the letters "CR."

   (NOTE: A number which is repeated consecutively need not be indexed again. Simply depress the plus or minus key the number of times the number is to be added or subtracted.)

A. Subtraction problems

1.	2.	3.	4.	5.
246	773	948	305	894
-108	-583	-652	-243	-290

6.	7.	8.	9.	10.
582	422	620	485	880
374	-755	543	574	-106
-186	937	-812	415	798
- 90	-629	758	-524	-50
+200	+868	+ -246	+ -354	+ 333

B. Credit balances

1.	2.	3.	4.	5.
645	726	768	545	293
-912	-983	-815	-610	-541

6.	7.	8.	9.	10.
193	328	132	678	377
-865	-548	108	305	-600
-411	176	-835	110	52
72	-461	266	-729	23
+500	+259	+ 74	+ -526	+125

DECIMALS

DIRECTIONS: Following the procedure given below, complete each problem using the touch method.

Procedure:

1. Clear the calculator.
2. Set the decimal selector as required.
3. Place fingers in home row position.
4. Index and enter numbers, and depress necessary operation(s) key(s).
5. Record answers on activity sheet.

A. **Set the decimal selector to accommodate the amount with the largest number of decimal spaces.**

1.
43.90
16.75
2.25
+ 55.666

2.
111.11
200.345
150.26
+ 125.78

3.
518.36
75.00
98.206
+ 183.44

4.
23.998
+ 56.5

5.
34.2
75.16
+ 84.672

B. **Set the decimal selector at "+" (add mode).**

1.
$ 25.75
100.56
315.00
+ 75.82

2.
$ 218.00
3962.44
+ 571.21

3.
$ 75.16
22.83
78.47
50.19
+ 95.46

4.
$88.88
- 44.44

5.
$150.49
- 100.21

MULTIPLICATION

DIRECTIONS: Many electronic calculators differ in the procedure for entering and completing multiplication problems. Consult the operator's manual for the correct multiplication procedure for your model, and complete each problem below.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 2.
3. Place fingers in home row position.
4. Proceed as instructed for multiplication in the operator's manual.
5. Record the products on the activity sheet.

A. **Multiplication problems**

1. 10 x 9
2. 120 x 3
3. 1.25 x .25
4. 2.66 x .6
5. 32.6 x .75
6. 115 x 235
7. 9684 x .35
8. 402 x 26
9. 25 x 75
10. 88 x .66

B. **Multiplication with constants.**

A repeated multiplicand or multiplier (a constant) need only be entered once. The various models of calculators have different methods for multiplication with constants. Check the operator's manual for your calculator for the correct procedure to follow in working these problems.

1. 100 x 12
2. 25 x 12
3. 3.66 x 12
4. 749 x 12
5. 833 x 12
6. 65 x 4
7. 65 x 18
8. 65 x .20
9. 65 x .33
10. 65 x 9

DIVISION

DIRECTIONS: Many electronic calculators differ in the procedure for entering and completing division problems. Consult the operator's manual for your model, and complete each problem below.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 1.
3. Place fingers in home row position.
4. Proceed as instructed for division in the operator's manual.
5. Record the quotients on the activity sheet.

A. **Division problems**

1. 125 ÷ 5 =
2. 250 ÷ 50 =
3. 250 ÷ 60 =
4. 916 ÷ 15 =
5. 10.5 ÷ 4 =
6. 78 ÷ 16 =
7. 100 ÷ 3 =
8. 750 ÷ 25 =
9. 6593 ÷ 23 =
10. 375 ÷ 500 =

B. **Division with constants.**

A repeated dividend or divisor (a constant) need only be entered once. The various models of calculators have different methods for division with constants. Check the operator's manual for your calculator for the correct procedure to follow in working these problems.

1. 182 ÷ 14 =
2. 567 ÷ 14 =
3. 485 ÷ 14 =
4. 315 ÷ 14 =
5. 289 ÷ 14 =
6. 345 ÷ 8 =
7. 345 ÷ 12 =
8. 345 ÷ 13 =
9. 345 ÷ 20 =
10. 345 ÷ 9 =

CALCULATING PERCENTAGES

DIRECTIONS: Following the procedure given below, complete each problem using the touch method.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 2.
3. Index the percent.
6. Depress the percent key.
7. Depress the equals key. (Some calculators automatically show the percent amount after the percent key is depressed.)
8. Record the percentage on the activity sheet.

A. **Percentage problems**

1. 10% of 100 =
2. 25% of 200 =
3. 37% of $44.45 =
4. 20% of $18.00 =
5. 67% of $150.00 =

B. **Using the procedure for calculating percentages, calculate the commission each of the following salespersons earned on his/her weekly sales total.**

Salesperson	Sales Total	Percent of Commission	Commission Earned
Amy Anderson	$250.00	5%	1.
Nick Carter	$215.00	4%	2.
Jennifer Gold	$300.00	7%	3.
Melissa Hamby	$450.00	10%	4.
Mark Kastle	$275.00	6%	5.

CALCULATING DISCOUNTS

DIRECTIONS: Following the procedure given below, complete each problem using the touch method.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 2.
3. Find the percentage using the procedure learned in Activity 6. This amount is the discount. Record the discount on the activity sheet.
4. Index original amount.
5. Using your calculator's subtraction function, subtract the discount (found in Step 3 above) from the original amount.

   (NOTE: Some calculators will automatically subtract a percentage which is to be discounted. Check the operator's manual for your calculator to see if the machine you are using does this.)
6. Depress equals key (or record amount if automatically shown) to obtain total after discount. (This is the net amount or sale price.
7. Record net amount on the activity sheet.

The following list represents items in inventory which are to be sold at a special sale. Figure the amount of discount and the sale price for each.

		Amount of Discount	Sale (Net) Price
1.	$28.00 less 15%		
2.	$150.00 less 6%		
3.	$3,060.00 less 4%		
4.	$180.00 less 20%		
5.	$22.00 less 33%		
6.	$43.00 less 50%		
7.	$972.00 less 8%		
8.	$1,456.00 less 10%		
9.	$559.00 less 10%		
10.	$789.00 less 2%		

PRORATION

DIRECTIONS: Following the procedure given below, complete each problem using the touch method.

Procedure:

1. Clear the calculator.
2. Set the decimal selector at 2.
3. Add the floor space for each department to obtain the total floor space. Record the amount on the activity sheet.
4. Enter the total floor space as a constant divisor.
5. Divide the total floor space into the floor space for each department to obtain the percentage of the expense to be prorated to each department (round off percentages). Add the percentages to verify that they total 100 percent.
6. Record the percent of total floor space for each department on the activity sheet.
7. Enter the total rent expense as a constant multiplicand.
8. Multiply the total rent expense by the percent obtained in Step 5 for each department. This is the prorated rental expense to be paid by each department.
9. Record the prorated rental expense for each department on the activity sheet.

Department	Floor Space in Square Feet	Percent of Total Floor Space	Prorated Share of Rental Expense
Men's Wear	1,215	______	______
Misses	1,460	______	______
Junior Coordinates	875	______	______
Junior Dresses	640	______	______

Total Floor Space ____________

Total Rent Expense ____________

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ACTIVITY ONE

DIRECTIONS: Use the information below to complete the deposit slip for the Wonderland Child Care Center, 7409 Taylor Avenue, Abilene, Texas, 75244, on the form provided. Use October 19, 19-- as the date. The account number is 206-981-4.

(**NOTE:** This information will also be used in Activity 3.)

Currency:	2	$100
	1	$50
	16	$20
	25	$10
	12	$5
	18	$1
Coins:	22	quarters
	38	dimes
	25	nickles
	47	pennies

Checks:	Michael Brown	$32.50
	Theresa Crenshaw	46.00
	David Harris	46.00
	Don Anderson	58.50
	Janice Greggory	58.50
	Linda Armstrong	32.50
	Beth St. Paul	46.00
	George Goodwin	92.00
	Grace Reyes	46.00
	Carol Chapman	92.00
	Ann Jasper	32.50
	John Seymore	36.00

DEPOSITED WITH

ACCOUNT NUMBER

____________ 19______

NAME ______________________________

ADDRESS ______________________________

CITY ______________________________

FOR BANK ► USE

Sign Here For Less Cash

CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S COLLECTION AGREEMENT

CURRENCY		
COIN		
CHECKS		
TOTAL		
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS NET DEPOSIT ►		

CHECKS LIST SINGLY	DOLLARS	CENTS
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
TOTAL		

ENTER TOTAL ON THE FRONT OF THIS TICKET

BEST COPY AVAILABLE

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ACTIVITY TWO

DIRECTIONS: Type a check for each of the following expenses, using the form provided by the instructor. Use October 22, 19-- as the date. Sign your name on the checks.

(**NOTE:** This information will also be used in Activity 3.)

No. 569, West-Tex Phone Company, $18.50, October phone bill.
No. 570, Abilene Electric Company, $34.18, October electric bill.
No. 571, Food-Mart Grocery, $267.35, food.
No. 572, Calvin Produce Company, $96.00, produce.
No. 573, Dan's Dairy, $65.40, dairy products.
No. 574, Joy's Toy Store, $58.48, playground equipment.

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

_______________ 19____ 88-335/1119

PAY TO THE ORDER OF______________________________________ $________

____ DOLLARS

THE FIRST NATIONAL BANK

____________________ ____________________

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

_______________ 19____ 88-335/1119

PAY TO THE ORDER OF______________________________________ $________

____ DOLLARS

THE FIRST NATIONAL BANK

____________________ ____________________

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

______________ 19___ 88-335/1119

PAY TO THE ORDER OF ________________________________ $ __________

____ DOLLARS

THE FIRST NATIONAL BANK

__________________ __________________

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

______________ 19___ 88-335/1119

PAY TO THE ORDER OF ________________________________ $ __________

____ DOLLARS

THE FIRST NATIONAL BANK

__________________ __________________

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

_______________ 19____ 88-335/1119

PAY TO THE ORDER OF ______________________________ $ __________

______________________________ DOLLARS

THE FIRST NATIONAL BANK

______________________ ______________________

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No.

_______________ 19____ 88-335/1119

PAY TO THE ORDER OF ______________________________ $ __________

______________________________ DOLLARS

THE FIRST NATIONAL BANK

______________________ ______________________

⑆111903355⑆

483

484

DIRECTIONS: Enter the information regarding the deposit and the checks prepared in Activities One and Two on the check register provided.

CHECK REGISTER

CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK		✓	AMOUNT OF DEPOSIT		BALANCE FORWARD		
									15, 238	49
559	9/28	To Calvin Produce						Check or Dep.	-43	20
		For vegetables	43	20	✓			Bal.	15195	29
560	9/30	To Dan's Dairy						Check or Dep.	-46	86
		For milk	46	86				Bal.	15148	43
561	10/2	To Foodmart Grocery						Check or Dep.	-116	25
		For groceries	116	25				Bal.	15032	18
562	10/2	To Evans Heating + Plumbing						Check or Dep.	-1,047	31
		For repairs	1,047	31				Bal.	13,984	87
	10/6	To						Check or Dep.	+347	06
		For				347	06	Bal.	14,331	93
563	10/6	To Harry's Auto Repair						Check or Dep.	-128	18
		For repairs on van	128	18				Bal.	14203	75
564	10/9	To Abilene Water Dept						Check or Dep.	-37	50
		For water bill	37	50				Bal.	14,166	25
	10/16	To						Check or Dep.	+409	20
		For				409	20	Bal.	14,575	45
565	10/16	To Foodmart Grocery						Check or Dep.	-261	00
		For groceries	261	00				Bal.	14,314	45
566	10/16	To Abilene Gas Co.						Check or Dep.	-41	03
		For gas bill	41	03				Bal.	14,273	42
567	10/16	To Abilene Daily Journal						Check or Dep.	-6	95
		For advertisement	6	95				Bal.	14,266	47
	10/16	To						Check or Dep.	+388	62
		For				388	62	Bal.	14655	09
568	10/19	To Carley Insurance Agency						Check or Dep.	-29	79
		For premium	29	79				Bal.	14,625	30
		To						Check or Dep.		
		For						Bal.		
		To						Check or Dep.		
		For						Bal.		
		To						Check or Dep.		
		For						Bal.		
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		To						Check or Dep.		
		For						Bal.		
		To						Check or Dep.		
		For						Bal.		

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ACTIVITY FOUR

DIRECTIONS: Using the check register prepared for Activity three and the bank statement, reconciliation form, and canceled checks provided, reconcile the bank statement and the check register.

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 560

September 30 19-- [illegible]

PAY TO THE ORDER OF Dan's Dairy $46.86

Forty-six and 86/100--DOLLARS

THE FIRST NATIONAL BANK

milk

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 561

October 2, 19-- [illegible]

PAY TO THE ORDER OF Foodmart Grocery $116.25

One hundred sixteen and 25/100--DOLLARS

THE FIRST NATIONAL BANK

groceries

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 562

October 2, 19-- [illegible]

PAY TO THE ORDER OF Evan's Heating and Plumbing $1,047.31

One thousand forty-seven and 31/100----------------------------------DOLLARS

THE FIRST NATIONAL BANK

repairs

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 563

October 6, 19-- [illegible]

PAY TO THE ORDER OF Harry's Auto Repair $128.18

One hundred twenty-eight and 18/100----------------------------------DOLLARS

THE FIRST NATIONAL BANK

repairs on van

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 564

October 9 19--

88-339/1110

PAY TO THE ORDER OF Abilene Water Department $37.50

Thirty-seven and 50/100--DOLLARS

THE FIRST NATIONAL BANK

water bill

Authorized Signature

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 565

October 16, 19--

88-339/1110

PAY TO THE ORDER OF Foodmart Grocery $261.00

Two hundred sixty-one and no/100-------------------------------------DOLLARS

THE FIRST NATIONAL BANK

groceries

Authorized Signature

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 566

October 16, 19--

88-339/1110

PAY TO THE ORDER OF Abilene Gas Company $41.03

Forty-one and 03/100---DOLLARS

THE FIRST NATIONAL BANK

gas bill

Authorized Signature

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 567

Octcber 16, 19--

88-339/1110

PAY TO THE ORDER OF Abilene Daily Journal $6.95

Six and 95/100---DOLLARS

THE FIRST NATIONAL BANK

advertisement

Authorized Signature

⑆111903355⑆

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 568

October 19 19--

[illegible]

PAY TO THE ORDER OF Corley Insurance Agency $29.79

Twenty-nine and 79/100--DOLLARS

THE FIRST NATIONAL BANK

premium

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 569

October 22, 19--

[illegible]

PAY TO THE ORDER OF West-Tex Phone Company $18.50

Eighteen and 50/100--DOLLARS

THE FIRST NATIONAL BANK

October phone bill

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 570

October 22, 19--

[illegible]

PAY TO THE ORDER OF Abilene Electric Company $34.18

Thirty-four and 18/100---DOLLARS

THE FIRST NATIONAL BANK

October electric bill

Authorized Signature

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 574

October 22, 19--

[illegible]

PAY TO THE ORDER OF Joy's Toy Store $58.48

Fifty-eight and 48/100---DOLLARS

THE FIRST NATIONAL BANK

playground equipment

Authorized Signature

•:111903355:

THE FIRST NATIONAL BANK

ON	YOUR BALANCE WAS	NO.	WE SUBTRACTED CHECKS TOTALING	LESS ACTIVITY CHARGE	NO.	WE ADDED DEPOSITS OF	MAKING YOUR PRESENT BALANCE
9/30	$15,195.29	12	$1,826.03	$4.60	4	$2,672.40	$16,037.06

DATE	CHECKS			DEPOSITS	BALANCE
10/02	46.86				15,148.43
10/05	116.25				15,032.18
10/06	1,047.31			347.06	14,331.93
10/13				409.20	14,741.13
10/14	128.18	37.50			14,575.45
10/16				388.62	14,964.07
10/19	41.03	261.00	6.95		14,655.09
10/20				1,527.52	16,182.61
10/21	29.79				16,152.82
10/26	18.50	34.18			16,100.14
10/28	58.48				16,041.66
10/30	4.60s				16,037.06

PLEASE EXAMINE AT ONCE, if no error is reported within ten days, the account will be considered correct. PLEASE NOTIFY BANK IN WRITING OF CHANGE OF ADDRESS.

D = AUTOMATIC DRAFT I = INTEREST DEPOSIT M = DEBIT MEMO OD = OVERDRAFT R = REVERSING ENTRY S = SERVICE CHARGE

THIS IS PROVIDED TO HELP YOU BALANCE YOUR BANK STATEMENT.

BANK BALANCE SHOWN ON THIS STATEMENT $ ____________

ADD + (IF ANY) DEPOSITS NOT SHOWN ON THIS STATEMENT ____________

TOTAL ____________

SUBTRACT - (IF ANY) CHECKS OUTSTANDING ____________

BALANCE $ ____________

SHOULD AGREE WITH YOUR CHECKBOOK BALANCE

CHECKS OUTSTANDING		
NO.	AMOUNT	
TOTAL		

THIS IS PROVIDED TO HELP YOU BALANCE YOUR CHECKBOOK

CHECKBOOK BALANCE AT STATEMENT DATE $ ____________

SUBTRACT - (IF ANY) ACTIVITY CHARGE ____________

SUB-TOTAL ____________

SUBTRACT - (IF ANY) OTHER BANK CHARGES ____________

BALANCE $ ____________

SHOULD AGREE WITH YOUR STATEMENT BALANCE

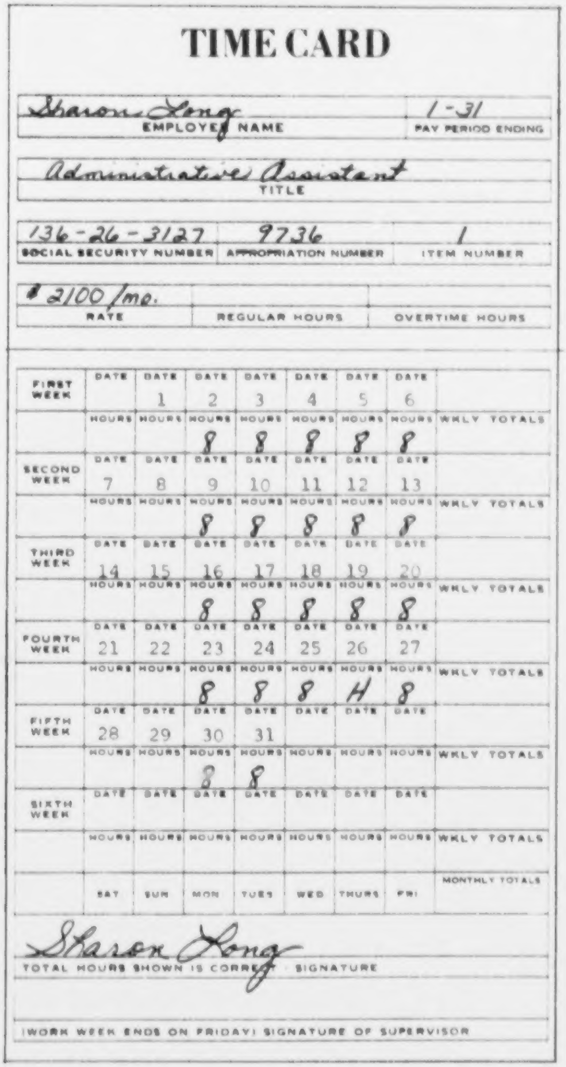
IF YOUR ACCOUNT DOES NOT BALANCE--
PLEASE CHECK THE FOLLOWING CAREFULLY

- ☐ HAVE YOU CORRECTLY ENTERED THE AMOUNT OF EACH CHECK ON YOUR CHECKBOOK STUBS?
- ☐ ARE THE AMOUNTS OF YOUR DEPOSITS ENTERED ON CHECKBOOK STUBS THE SAME AS IN YOUR STATEMENT?
- ☐ HAVE ALL CHECKS BEEN DEDUCTED FROM YOUR STUBS?
- ☐ HAVE YOU DEDUCTED ALL BANK CHARGES FROM YOUR STUBS?
- ☐ HAVE YOU CARRIED THE CORRECT BALANCE FORWARD FROM ONE CHECKBOOK STUB TO THE NEXT?
- ☐ HAVE YOU CHECKED ALL ADDITIONS AND SUBTRACTIONS ON YOUR CHECKBOOK STUBS?

DIRECTIONS: Use the information below to complete the time cards provided.

(**NOTE:** These cards will be used in Activity Sheet two.)

1. Hourly employees are paid time and one-half for all hours worked over 40 hours in one week.
2. V = vacation time; SL = sick leave; H = paid holiday.



TIME CARD

Sharon Long EMPLOYEE NAME	1-31 PAY PERIOD ENDING

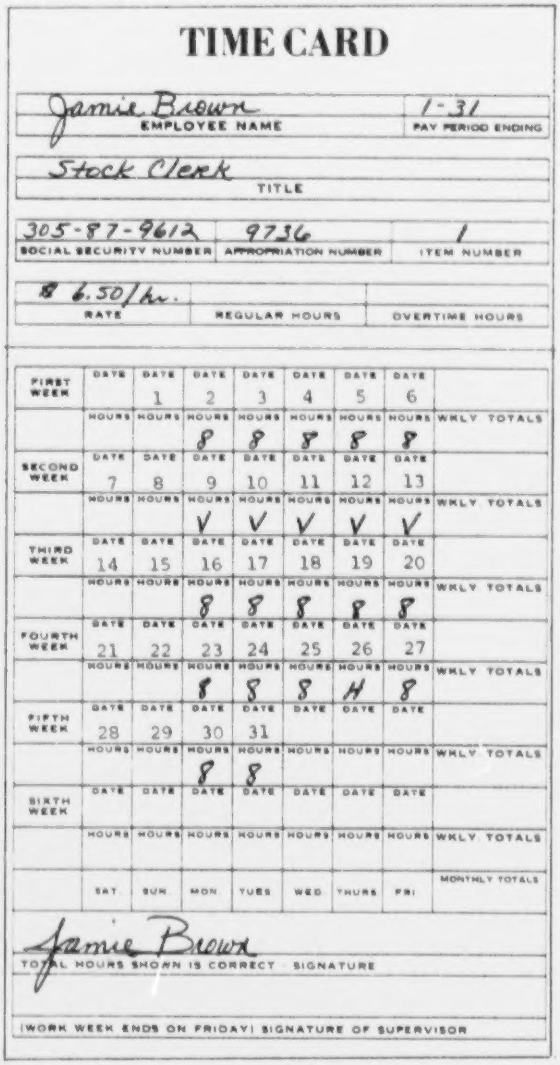
Administrative Assistant
TITLE

136-26-3127 SOCIAL SECURITY NUMBER	9736 APPROPRIATION NUMBER	1 ITEM NUMBER
$2100/mo. RATE	REGULAR HOURS	OVERTIME HOURS

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS

Sharon Long
TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



TIME CARD

Jamie Brown EMPLOYEE NAME	1-31 PAY PERIOD ENDING

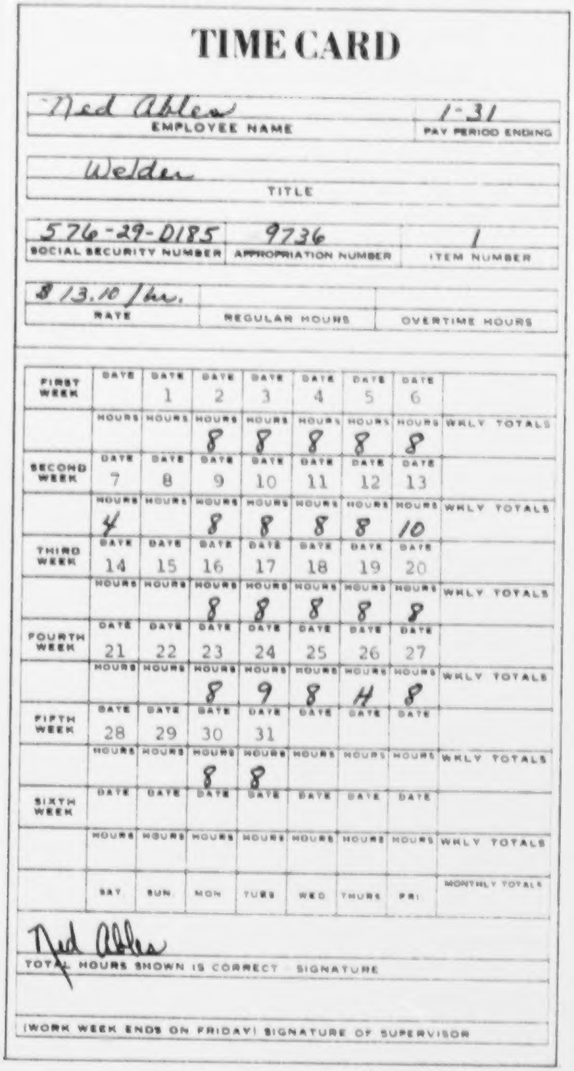
Stock Clerk
TITLE

305-87-9612 SOCIAL SECURITY NUMBER	9736 APPROPRIATION NUMBER	1 ITEM NUMBER
$6.50/hr. RATE	REGULAR HOURS	OVERTIME HOURS

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS ✓	HOURS ✓	HOURS ✓	HOURS ✓	HOURS ✓	WKLY TOTALS
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT.	SUN.	MON.	TUES	WED	THURS	FRI	MONTHLY TOTALS

Jamie Brown
TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



TIME CARD

Ned Ables — EMPLOYEE NAME | 1-31 — PAY PERIOD ENDING

Welder — TITLE

576-29-0185 — SOCIAL SECURITY NUMBER | 9736 — APPROPRIATION NUMBER | 1 — ITEM NUMBER

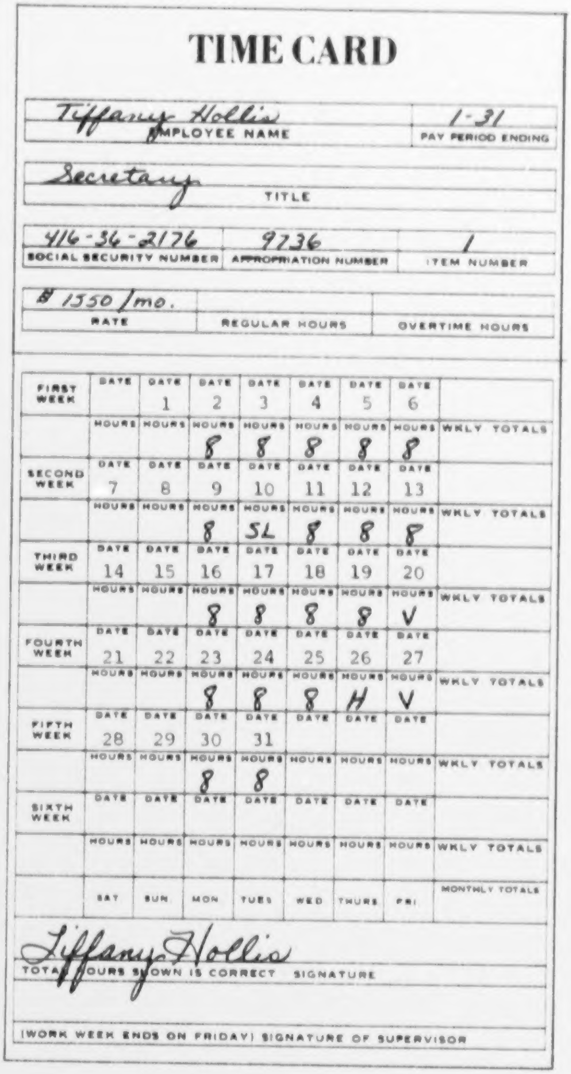
$13.10/hr. — RATE | REGULAR HOURS | OVERTIME HOURS

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS 4	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 10	WKLY TOTALS
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 9	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS

Ned Ables

TOTAL HOURS SHOWN IS CORRECT   SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



TIME CARD

Tiffany Hollis — EMPLOYEE NAME | 1-31 — PAY PERIOD ENDING

Secretary — TITLE

416-36-2176 — SOCIAL SECURITY NUMBER | 9736 — APPROPRIATION NUMBER | 1 — ITEM NUMBER

$1550/mo. — RATE | REGULAR HOURS | OVERTIME HOURS

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS 8	HOURS SL	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS V	WKLY TOTALS
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS V	WKLY TOTALS
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS

Tiffany Hollis

TOTAL HOURS SHOWN IS CORRECT   SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR

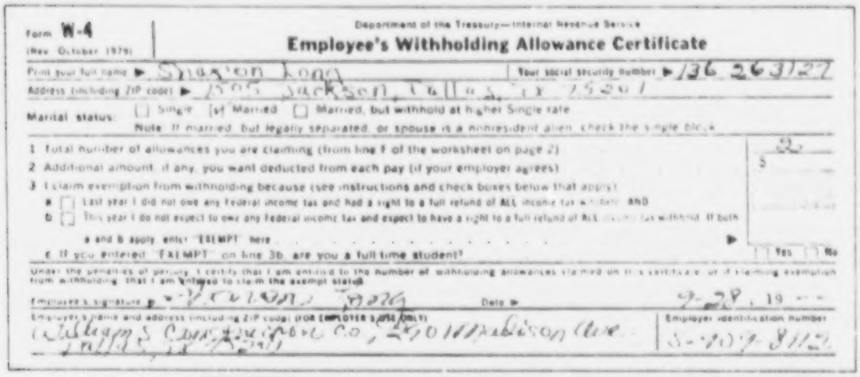
FINANCIAL MANAGEMENT/PAYROLL PROCEDURES/ACTIVITY TWO

DIRECTIONS: Using the time cards completed in Activity one, the W-4 forms and the tax tables provided, and the information below, prepare an employee's earnings record form for each employee. Use the forms provided.

(**NOTE:** These forms will be used in completing Activity three.)

1. Compute the FICA deduction using the percentage 6.65%.
2. Determine the Federal income tax using the tables provided.
3. Compute the retirement deduction for each employee by using the percentage 5.75%.
4. Subtract the following voluntary deductions for the employees:

a.	Sharon Long	Health Insurance, $35.85 Disability Insurance, $11.07
b.	Jamie Brown	Health Insurance, $22.37
c.	Ned Ables	Disability Insurance, $9.78
d.	Tiffany Hollis	Health Insurance, $22.37



Form **W-4** (Rev. October 1979)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

Print your full name ▶ Sharon Long | Your social security number ▶ 136 263127

Address (including ZIP code) ▶ 1505 Jackson, Dallas, TX 75201

Marital status: ☐ Single ☑ Married ☐ Married, but withhold at higher Single rate

Note: If married, but legally separated, or spouse is a nonresident alien, check the single block.

1 Total number of allowances you are claiming (from line F of the worksheet on page 2) 2

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) $

3 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of ALL income tax withheld, AND

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of ALL income tax withheld. If both a and b apply, enter "EXEMPT" here ▶

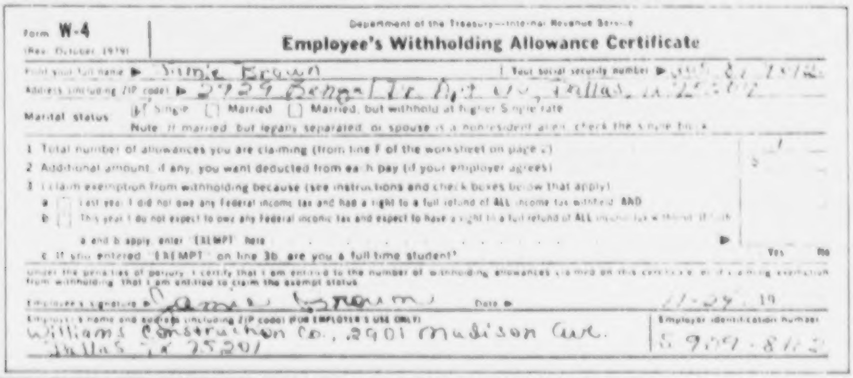
c If you entered "EXEMPT" on line 3b, are you a full-time student? ☐ Yes ☐ No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's signature ▶ Sharon Long Date ▶ 9-28, 19--

Employer's name and address (including ZIP code) (FOR EMPLOYER'S USE ONLY) Williams Construction Co., 2901 Madison Ave. Dallas, TX 75201

Employer identification number 5-909-8112



Form **W-4** (Rev. October 1979)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

Print your full name ▶ Jimie Brown | Your social security number ▶ [illegible] 1512

Address (including ZIP code) ▶ 2929 Bengal Dr. Apt 4, Dallas, TX 75202

Marital status: ☑ Single ☐ Married ☐ Married, but withhold at higher Single rate

Note: If married, but legally separated, or spouse is a nonresident alien, check the single block.

1 Total number of allowances you are claiming (from line F of the worksheet on page 2) 1

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) $

3 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of ALL income tax withheld, AND

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of ALL income tax withheld. If both a and b apply, enter "EXEMPT" here ▶

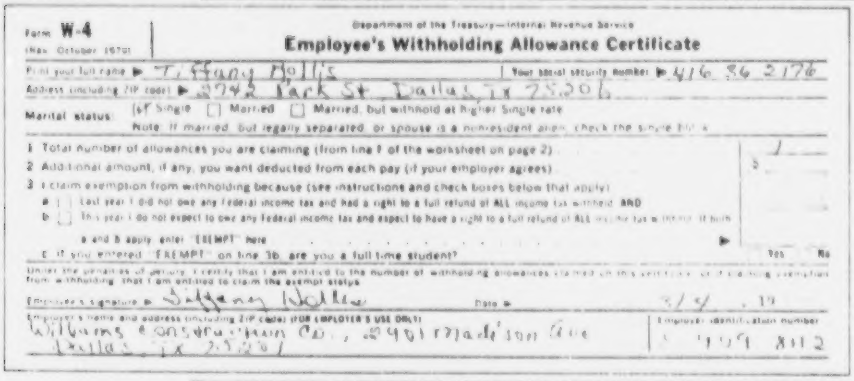
c If you entered "EXEMPT" on line 3b, are you a full-time student? Yes No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's signature ▶ Jamie Brown Date ▶ 11-29, 19

Employer's name and address (including ZIP code) (FOR EMPLOYER'S USE ONLY) Williams Construction Co., 2901 Madison Ave. Dallas, TX 75201

Employer identification number 5-909-8112



Form **W-4** (Rev. October 1979)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

Print your full name ▶ Tiffany Hollis | Your social security number ▶ 416 36 2176

Address (including ZIP code) ▶ 2742 Park St. Dallas, TX 75206

Marital status: ☑ Single ☐ Married ☐ Married, but withhold at higher Single rate

Note: If married, but legally separated, or spouse is a nonresident alien, check the single block.

1 Total number of allowances you are claiming (from line F of the worksheet on page 2) 1

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) $

3 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of ALL income tax withheld, AND

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of ALL income tax withheld. If both a and b apply, enter "EXEMPT" here ▶

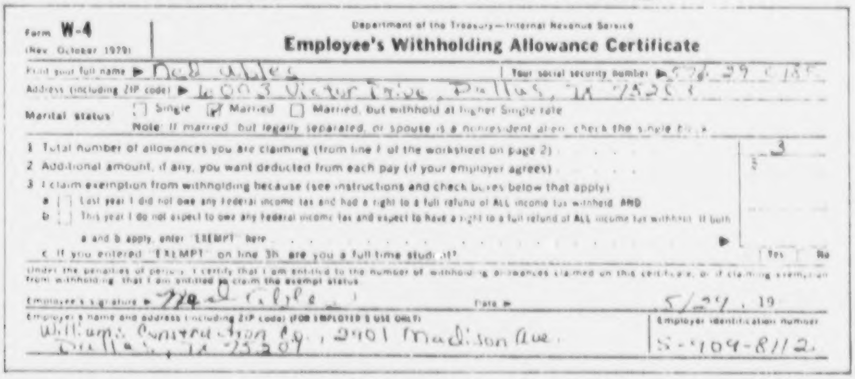
c If you entered "EXEMPT" on line 3b, are you a full-time student? Yes No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's signature ▶ Tiffany Hollis Date ▶ 3/4, 19

Employer's name and address (including ZIP code) (FOR EMPLOYER'S USE ONLY) Williams Construction Co., 2901 Madison Ave Dallas, TX 75201

Employer identification number 5 909 8112



Form **W-4** (Rev. October 1979)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

Print your full name ▶ Ned Alles | Your social security number ▶ [illegible]

Address (including ZIP code) ▶ 6003 Victor Drive, Dallas, TX 75203

Marital status: ☐ Single ☑ Married ☐ Married, but withhold at higher Single rate

Note: If married, but legally separated, or spouse is a nonresident alien, check the single block.

1 Total number of allowances you are claiming (from line F of the worksheet on page 2) 3

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) $

3 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of ALL income tax withheld, AND

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of ALL income tax withheld. If both a and b apply, enter "EXEMPT" here ▶

c If you entered "EXEMPT" on line 3b, are you a full-time student? ☐ Yes ☐ No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's signature ▶ Ned Alles Date ▶ 5/24, 19

Employer's name and address (including ZIP code) (FOR EMPLOYER'S USE ONLY) Williams Construction Co., 2901 Madison Ave. Dallas, TX 75201

Employer identification number 5-909-8112

BEST COPY AVAILABLE

SINGLE Persons—MONTHLY Payroll Period

And the wages are—		And the number of withholding allowances claimed is—										
At least	But less than	0	1	2	3	4	5	6	7	8	9	10 or more
		The amount of income tax to be withheld shall be—										
$580	$600	$80.90	$65.20	$50.20	$35.20	$20.80	$8.30	$0	$0	$0	$0	$0
600	640	87.20	70.60	55.60	40.60	25.60	12.80	.30	0	0	0	0
640	680	95.60	78.10	62.80	47.80	32.80	18.80	6.30	0	0	0	0
680	720	104.00	86.50	70.00	55.00	40.00	25.00	12.30	0	0	0	0
720	760	112.40	94.90	77.40	62.20	47.20	32.20	18.30	5.80	0	0	0
760	800	120.80	103.30	85.80	69.40	54.40	39.40	24.40	11.80	0	0	0
800	840	129.20	111.70	94.20	76.70	61.60	46.60	31.60	17.80	5.30	0	0
840	880	138.10	120.10	102.60	85.10	68.80	53.80	38.80	23.80	11.30	0	0
880	920	148.50	128.50	111.00	93.50	76.00	61.00	46.00	31.00	17.30	4.80	0
920	960	158.90	137.20	119.40	101.90	84.40	68.20	53.20	38.20	23.30	10.80	0
960	1,000	169.30	147.60	127.80	110.30	92.80	75.40	60.40	45.40	30.40	16.80	4.30
1,000	1,040	179.70	158.00	136.40	118.70	101.20	83.70	67.60	52.60	37.60	22.80	10.30
1,040	1,080	190.10	168.40	146.80	127.10	109.60	92.10	74.80	59.80	44.80	29.80	16.30
1,080	1,120	200.50	178.80	157.20	135.50	118.00	100.50	83.00	67.00	52.00	37.00	22.30
1,120	1,160	210.90	189.20	167.60	145.90	126.40	108.90	91.40	74.20	59.20	44.20	29.20
1,160	1,200	221.30	199.60	178.00	156.30	134.80	117.30	99.80	82.30	66.40	51.40	36.40
1,200	1,240	233.20	210.00	188.40	166.70	145.00	125.70	108.20	90.70	73.60	58.60	43.60
1,240	1,280	245.20	220.40	198.80	177.10	155.40	134.10	116.60	99.10	81.60	65.80	50.80
1,280	1,320	257.20	232.20	209.20	187.50	165.80	144.20	125.00	107.50	90.00	73.00	58.00
1,320	1,360	269.20	244.20	219.60	197.90	176.20	154.60	133.40	115.90	98.40	80.90	65.20
1,360	1,400	281.20	256.20	231.20	208.30	186.60	165.00	143.30	124.30	106.80	89.30	72.40
1,400	1,440	293.20	268.20	243.20	218.70	197.00	175.40	153.70	132.70	115.20	97.70	80.20
1,440	1,480	306.20	280.20	255.20	230.20	207.40	185.80	164.10	142.40	123.60	106.10	88.60
1,480	1,520	319.80	292.20	267.20	242.20	217.80	196.20	174.50	152.80	132.00	114.50	97.00
1,520	1,560	333.40	305.10	279.20	254.20	229.20	206.60	184.90	163.20	141.60	122.90	105.40
1,560	1,600	347.00	318.70	291.20	266.20	241.20	217.00	195.30	173.60	152.00	131.30	113.80
1,600	1,640	360.60	332.30	304.00	278.20	253.20	228.20	205.70	184.00	162.40	140.70	122.20
1,640	1,680	374.20	345.90	317.60	290.20	265.20	240.20	216.10	194.40	172.80	151.10	130.60
1,680	1,720	387.80	359.50	331.20	302.80	277.20	252.20	227.20	204.80	183.20	161.50	139.80
1,720	1,760	401.40	373.10	344.80	316.40	289.20	264.20	239.20	215.20	193.60	171.90	150.20
1,760	1,800	415.00	386.70	358.40	330.00	301.70	276.20	251.20	226.20	204.00	182.30	160.60
1,800	1,840	428.60	400.30	372.00	343.60	315.30	288.20	263.20	238.20	214.40	192.70	171.00
1,840	1,880	442.20	413.90	385.60	357.20	328.90	300.60	275.20	250.20	225.20	203.10	181.40
1,880	1,920	457.10	427.50	399.20	370.80	342.50	314.20	287.20	262.20	237.20	213.50	191.80
1,920	1,960	472.70	441.10	412.80	384.40	356.10	327.80	299.40	274.20	249.20	224.20	202.20
1,960	2,000	488.30	455.80	426.40	398.00	369.70	341.40	313.00	286.20	261.20	236.20	212.60
2,000	2,040	503.90	471.40	440.00	411.60	383.30	355.00	326.60	298.30	273.20	248.20	223.20
2,040	2,080	519.50	487.00	454.50	425.20	396.90	368.60	340.20	311.90	285.20	260.20	235.20
2,080	2,120	535.10	502.60	470.10	438.80	410.50	382.20	353.80	325.50	297.20	272.20	247.20
2,120	2,160	550.70	518.20	485.70	453.20	424.10	395.80	367.40	339.10	310.80	284.20	259.20
2,160	2,200	566.30	533.80	501.30	468.80	437.70	409.40	381.00	352.70	324.40	296.20	271.20
2,200	2,240	581.90	549.40	516.90	484.40	451.90	423.00	394.60	366.30	338.00	309.60	283.20
2,240	2,280	397.50	565.00	532.50	500.00	467.50	436.60	408.20	379.90	351.60	323.20	295.20
2,280	2,320	613.10	580.60	548.10	515.60	483.10	450.60	421.80	393.50	365.20	336.80	308.50
2,320	2,360	628.70	596.20	563.70	531.20	498.70	466.20	435.40	407.10	378.80	350.40	322.10
2,360	2,400	644.30	611.80	579.30	546.80	514.30	481.80	449.30	420.70	392.40	364.00	335.70
2,400	2,440	659.90	627.40	594.90	562.40	529.90	497.40	464.90	434.30	406.00	377.60	349.30
2,440	2,480	675.50	643.00	610.50	578.00	545.50	513.00	480.50	448.00	419.60	391.20	362.90
2,480	2,520	691.10	658.60	626.10	593.60	561.10	528.60	496.10	463.60	433.20	404.80	376.50
2,520	2,560	706.70	674.20	641.70	609.20	576.70	544.20	511.70	479.20	446.80	418.40	390.10
2,560	2,600	722.30	689.80	657.30	624.80	592.30	559.80	527.30	494.80	462.30	432.00	403.70
2,600	2,640	737.90	705.40	672.90	640.40	607.90	575.40	542.90	510.40	477.90	445.60	417.30
2,640	2,680	753.50	721.00	688.50	656.00	623.50	591.00	558.50	526.00	493.50	461.00	430.90
2,680	2,720	769.10	736.60	704.10	671.60	639.10	606.60	574.10	541.60	509.10	476.60	444.50
2,720	2,760	784.70	752.20	719.70	687.20	654.70	622.20	589.70	557.20	524.70	492.20	459.70
		39 percent of the excess over $2,760 plus—										
$2,760 and over		792.50	760.00	727.50	695.00	662.50	630.00	597.50	565.00	532.50	500.00	467.50

MARRIED Persons—**MONTHLY** Payroll Period

And the wages are—		And the number of withholding allowances claimed is—										
At least	But less than	0	1	2	3	4	5	6	7	8	9	10 or more
		The amount of income tax to be withheld shall be—										
$1,360	$1,400	$220.00	$200.00	$181.10	$163.60	$146.10	$128.60	$111.90	$96.90	$81.90	$66.90	$52.00
1,400	1,440	229.60	209.60	189.60	172.00	154.50	137.00	119.50	104.10	89.10	74.10	59.10
1,440	1,480	239.20	219.20	199.20	180.40	162.90	145.40	127.90	111.30	96.30	81.30	66.30
1,480	1,520	248.80	228.80	208.80	188.80	171.30	153.80	136.30	118.80	103.50	88.50	73.50
1,520	1,560	258.40	238.40	218.40	198.40	179.70	162.20	144.70	127.20	110.70	95.70	80.70
1,560	1,600	268.00	248.00	228.00	208.00	188.10	170.60	153.10	135.60	118.10	102.90	87.90
1,600	1,640	278.40	257.60	237.60	217.60	197.60	179.00	161.50	144.00	126.50	110.10	95.10
1,640	1,680	289.60	267.20	247.20	227.20	207.20	187.40	169.90	152.40	134.90	117.40	102.30
1,680	1,720	300.80	277.40	256.80	236.80	216.80	196.80	178.30	160.80	143.30	125.60	109.50
1,720	1,760	312.00	288.60	266.40	246.40	226.40	206.40	186.70	169.20	151.70	134.20	116.70
1,760	1,800	323.20	299.80	276.50	256.00	236.00	216.00	196.00	177.60	160.10	142.60	125.10
1,800	1,840	334.40	311.00	287.70	265.60	245.60	225.60	205.60	186.00	168.50	151.00	133.50
1,840	1,880	345.60	322.20	298.90	275.60	255.20	235.20	215.20	195.20	176.90	159.40	141.90
1,880	1,920	356.80	333.40	310.10	286.80	264.80	244.80	224.80	204.80	185.30	167.80	150.30
1,920	1,960	368.00	344.60	321.30	298.00	274.60	254.40	234.40	214.40	194.40	176.20	158.70
1,960	2,000	379.70	355.80	332.50	309.20	285.80	264.00	244.00	224.00	204.00	184.60	167.10
2,000	2,040	392.50	367.00	343.70	320.40	297.00	273.70	253.60	233.60	213.60	193.60	175.50
2,040	2,080	405.30	378.60	354.90	331.60	308.20	284.90	263.20	243.20	223.20	203.20	183.90
2,080	2,120	418.10	391.40	366.10	342.80	319.40	296.10	272.80	252.80	232.80	212.80	192.80
2,120	2,160	430.90	404.20	377.60	354.00	330.60	307.30	284.00	262.40	242.40	222.40	202.40
2,160	2,200	443.70	417.00	390.40	365.20	341.80	318.50	295.20	272.00	252.00	232.00	212.00
2,200	2,240	456.50	429.80	403.20	376.50	353.00	329.70	306.40	283.00	261.60	241.60	221.60
2,240	2,280	469.30	442.60	416.00	389.30	364.20	340.90	317.60	294.20	271.20	251.20	231.20
2,280	2,320	482.10	455.40	428.80	402.10	375.40	352.10	328.80	305.40	282.10	260.80	240.80
2,320	2,360	494.90	468.20	441.60	414.90	388.20	363.30	340.00	316.60	293.30	270.40	250.40
2,360	2,400	507.70	481.00	454.40	427.70	401.00	374.50	351.20	327.80	304.50	281.20	260.00
2,400	2,440	521.10	493.80	467.20	440.50	413.80	387.20	362.40	339.00	315.70	292.40	269.60
2,440	2,480	535.90	506.60	480.00	453.30	426.60	400.00	373.60	350.20	326.90	303.60	280.20
2,480	2,520	550.70	519.80	492.80	466.10	439.40	412.80	386.10	361.40	338.10	314.80	291.40
2,520	2,560	565.50	534.60	505.60	478.90	452.20	425.60	398.90	372.60	349.30	326.00	302.60
2,560	2,600	580.30	549.40	518.60	491.70	465.00	438.40	411.70	385.00	360.50	337.20	313.80
2,600	2,640	595.10	564.20	533.40	504.50	477.80	451.20	424.50	397.80	371.70	348.40	325.00
2,640	2,680	609.90	579.00	548.20	517.40	490.60	464.00	437.30	410.60	384.00	359.60	336.20
2,680	2,720	624.70	593.80	563.00	532.20	503.40	476.80	450.10	423.40	396.80	370.80	347.40
2,720	2,760	639.50	608.60	577.80	547.00	518.20	489.60	462.90	436.20	409.60	382.90	358.60
2,760	2,800	654.30	623.40	592.60	561.80	530.90	502.40	475.70	449.00	422.40	395.70	369.80
2,800	2,840	669.10	638.20	607.40	576.60	545.70	515.20	488.50	461.80	435.20	408.50	381.80
2,840	2,880	683.90	653.00	622.20	591.40	560.50	529.70	501.30	474.60	448.00	421.30	394.60
2,880	2,920	698.70	667.80	637.00	606.20	575.30	544.50	514.10	487.40	460.80	434.10	407.40
2,920	2,960	713.50	682.60	651.80	621.00	590.10	559.30	528.50	500.20	473.60	446.90	420.20
2,960	3,000	728.30	697.40	666.60	635.80	604.90	574.10	543.30	513.00	486.40	459.70	433.00
3,000	3,040	743.10	712.20	681.40	650.60	619.70	588.90	558.10	527.20	499.20	472.50	445.80
3,040	3,080	757.90	727.00	696.20	665.40	634.50	603.70	572.90	542.00	512.00	485.30	458.60
3,080	3,120	772.70	741.80	711.00	680.20	649.30	618.50	587.70	556.80	526.00	498.10	471.40
3,120	3,160	787.50	756.60	725.80	695.00	664.10	633.30	602.50	571.60	540.80	510.90	484.20
3,160	3,200	802.30	771.40	740.60	709.80	678.90	648.10	617.30	586.40	555.60	524.80	497.00
3,200	3,240	817.10	786.20	755.40	724.60	693.70	662.90	632.10	601.20	570.40	539.60	509.80
3,240	3,280	831.90	801.00	770.20	739.40	708.50	677.70	646.90	616.00	585.20	554.40	523.50
3,280	3,320	846.70	815.80	785.00	754.20	723.30	692.50	661.70	630.80	600.00	569.20	538.30
3,320	3,360	861.50	830.60	799.80	769.00	738.10	707.30	676.50	645.60	614.80	584.00	553.10
3,360	3,400	876.30	845.40	814.60	783.80	752.90	722.10	691.30	660.40	629.60	598.80	567.90
3,400	3,440	891.10	860.20	829.40	798.60	767.70	736.90	706.10	675.20	644.40	613.60	582.70
3,440	3,480	905.90	875.00	844.20	813.40	782.50	751.70	720.90	690.00	659.20	628.40	597.50
3,480	3,520	920.70	889.80	859.00	828.20	797.30	766.50	735.70	704.80	674.00	643.20	612.30
3,520	3,560	935.50	904.60	873.80	843.00	812.10	781.30	750.50	719.60	688.80	658.00	627.10
		37 percent of the excess over $3,560 plus—										
$3,560 and over		942.90	912.00	881.20	850.40	819.50	788.70	757.90	727.00	696.20	665.40	634.50

Employee's Earnings Record

NAME____________________ SINGLE________ MARRIED________

ADDRESS____________________ SOCIAL SECURITY NO.__________

____________________ POSITION________________

NO. OF EXEMPTIONS__________ WAGES________ O/T WAGE________

PAY PERIOD ENDING	GROSS PAY		FICA		FEDERAL INCOME TAX		HEALTH INS.		DISABILITY INS.		RETIREMENT	
1.												
2.												
3.												
4.												
5.												
6.												
7.												
8.												
9.												
10.												
11.												
12.												
TOTAL												

Summary

QUARTERS	TOTAL PAY		FICA		FEDERAL INCOME TAX		HEALTH INS.		DISABILITY INS.		RETIREMENT	
FIRST												
SECOND												
THIRD												
FOURTH												
TOTAL FOR YEAR												

DIRECTIONS: Enter the information from the employee's earnings records prepared in Activity two on the payroll register provided. Compute the total deductions and the net pay for each employee.

(**NOTE:** This form will be used in completing Activity four.)

PAYROLL REGISTER

PAY PERIOD ENDING _______________, 19___

EMPLOYEE NAME	SOCIAL SECURITY NUMBER	W.E.*	GROSS PAY	DEDUCTIONS					TOTAL DEDUCTIONS	NET PAY
				FICA	FEDERAL INCOME TAX	HEALTH INS.	DISA INS.	RETIREMENT		

*W.E. = WITHHOLDING EXEMPTIONS

FINANCIAL MANAGEMENT/PAYROLL PROCEDURES/ACTIVITY FOUR

DIRECTIONS: Using the payroll register in Activity three and the payroll checks provided, prepare a payroll check for each of the employees.

(**NOTE:** Number the checks consecutively, beginning with number 403.)

EMPLOYEE NAME			POSITION	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
OTHER	NET PAY			

YEAR TO DATE TOTALS

GROSS	FICA
INC. TAX	

NO. ________

DATE ________________

PAY TO THE ORDER OF ______________________________ $ __________

EXACTLY ______________________________ DOLLARS

____

EMPLOYEE NAME			POSITION	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
OTHER	NET PAY			

YEAR TO DATE TOTALS

GROSS	FICA
INC. TAX	

NO. ________

DATE ______________

PAY TO THE
ORDER OF ____ $ __________

EXACTLY ____ DOLLARS

____

EMPLOYEE NAME			POSITION	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
OTHER	NET PAY			

YEAR TO DATE TOTALS

GROSS	FICA
INC. TAX	

NO. ______

DATE ______________

PAY TO THE
ORDER OF ____ $ __________

EXACTLY ____ DOLLARS

____

EMPLOYEE NAME			POSITION	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
OTHER	NET PAY			

YEAR TO DATE TOTALS

GROSS	FICA
INC. TAX	

NO. ________

DATE ________________

PAY TO THE
ORDER OF ____ $ ____________

EXACTLY ____ DOLLARS

____

CREATING YOUR OWN ENTERPRISE

DIRECTIONS: In a free enterprise system, people may produce what they think will sell. Describe a product you think would sell (you may want to draw a picture), and then answer the following questions:

1. In what area(s) of the country will your product be sold?
2. In what type of place will your product be sold?
3. How many people will have a need or desire to purchase your product?
4. What will you charge for the product?
5. How much will it cost for you to make it?
6. What will be your profit per product?
7. How many people do you expect to employ to make the product?
8. Will it be an item that will go out of style, or that people will not like to buy after several years?
9. Will you manage the business?
10. Is there another product similar to yours on the market? If so, explain.

DIRECTIONS: Have you ever considered having your own business? Do you think it would be easier or harder working for someone else? This activity will help you experience both the good and bad points of being an entrepreneur. First, consider your classmates as your business partners. Can you and your partners think of a product that can be sold in your school, or perhaps a service you and your partners can provide for others? If so, you are on the right track to starting your own business and being an entrepreneur! By the way, below is a list of steps to follow for small business success. You should realize, however, that if you were starting an actual business, there would be many more steps to follow.

STEPS FOR SMALL BUSINESS SUCCESS

1. Decide what type of product or service you will sell.
2. Decide approximately how many people you expect will buy your product or want the service you are willing to provide.
3. If you are selling a product, decide whether you will make it or buy it from another company.
4. Decide what supplies will be needed to start your business.
5. Decide how much money will be needed to start your business.
6. Decide where you will get the money needed to start your business.
7. Figure the amount you will charge for your product or service in order to make a profit.
8. Decide when and where you will sell your product or provide your service.
9. Make sure that both the time and place you are selling your product or providing your service are convenient for others.
10. Agree on the name of your business.
11. Plan how you will advertise.
12. Decide how and who will keep track of the books. (Inventory, money paid out, money taken in, etc.)

FINANCIAL MANAGEMENT/ENTREPRENEURSHIP/ACTIVITY THREE

DIRECTIONS: On a sheet of paper or poster board, draw a picture showing the three necessary parts of an economic system.

FINANCIAL MANAGEMENT/ELECTRONIC CALCULATOR/UNIT TEST

DIRECTIONS: Match each term with its correct definition by placing the letter of the term in the appropriate space.

________ 1. The middle row of keys (4, 5, 6) on a ten-key keyboard.

________ 2. A negative balance obtained when the amount subtracted is greater than the amount added.

________ 3. A keyboard arrangement in which there are ten numeric keys (1-9) arranged in three rows of three keys each, with an additional key or bar (0) at the bottom of the last row.

________ 4. To depress the numeric keys of a number in order from left to right.

________ 5. To divide or to assess proportionately.

________ 6. A means of operating a ten-key keyboard by touch rather than by sight.

________ 7. An amount subtracted from a regular price.

________ 8. The inner mechanism of an electronic calculator where the computation is performed.

A. Ten-key keyboard
B. Prorate
C. Index a number
D. Discount
E. Home row
F. Register
G. Touch method
H. Credit balance

DIRECTIONS: State which finger is used to strike the following keys:

9. 4, 1, 7 keys ________________________________

10. Zero key ________________________________

11. 6, 9, 3 keys ________________________________

12. Operational keys to left of numeric keyboard ________________________________

13. Operational keys to right of numeric keyboard ________________________________

14. 5, 8, 2 keys ________________________________

DIRECTIONS: Using the calculator, find the correct answer for each of the following addition and subtraction problems. Show credit balances with a "-" or "CR".

15. 456	16. 444	17. 582	18. 211	19. 616
789	369	741	354	137
+ 123	+ 258	+ 963	+ 160	+ 248

20. 500	21. 824	22. $2.50	23. 1100	24. 615
- 216	- 650	-3.00	- 900	302
		4.98	501	-725
		-1.20	486	-302
		+ -6.10	+ 312	+ 26

DIRECTIONS: Using the calculator, find the correct products for each of the following multiplication problems.

25. 55	26. 3.11	27. 915	28. 40	29. 67
x .25	x 42	x 19	x 19	x 19

DIRECTIONS: Using the calculator, find the correct quotients for each of the following division problems.

30. 470 ÷ 33 =

31. 815 ÷ 33 =

32. 1156 ÷ 33 =

33. 177 ÷ 5 =

34. 892 ÷ 4 =

35. 228 ÷ 6 =

FINANCIAL MANAGEMENT/BANKING PROCEDURES/UNIT TEST

PART 1

DIRECTIONS: Match the correct term to the correct definition by placing the letter in the appropriate space.

________ 1. Process of getting the checkbook balance and the bank's balance to match.

________ 2. Checks which have been written and recorded on the register, but were not processed at the bank in time to be included on the bank statement.

________ 3. Tearing up a check that has been written incorrectly.

________ 4. The process that takes place from the time the check is deposited until it is paid.

________ 5. To put money into a bank account.

________ 6. A machine used in writing checks.

________ 7. Shows the amounts and types of money being deposited.

________ 8. American Bankers Association code numbers printed on checks and deposit slips.

________ 9. A printed record of all the transactions that have taken place in the checking account during the month.

________10. Deposits that were recorded on the account holder's check register or stub, but were not processed at the bank in time to be included on the bank statement.

________11. To sign one's name on the back of a check in order to receive cash or credit for the check.

________12. A check that has been paid by the bank and returned to the account holder with the bank statement.

a. ABA numbers
b. Bank statement
c. Canceled check
d. Check writing machine
e. Clearing the bank
f. Deposit
g. Deposit slip
h. Deposits in transit
i. Endorse
j. Outstanding checks
k. Reconciling a bank statement
l. Voiding a check

PART 2

DIRECTIONS: Circle the letter of the response that correctly completes the following statements.

1. When writing checks, the first step should be to:

   a. spell out the amount on the check.
   b. sign the check.
   c. record the necessary information on the check register or check stub.
   d. write in the purpose for the check.

2. If a check is written incorrectly, you should:

   a. erase the mistake and write over the error.
   b. destroy the check and start a new one.
   c. write VOID by that check number in the register.
   d. both b and c.

3. On a deposit slip, checks are:

   a. totaled and the amount listed under currency.
   b. listed separately.
   c. omitted.
   d. both a and b.

4. The purpose for which a check is written is described:

   a. on the back of the check.
   b. on the line in the lower left corner.
   c. on the line on the lower right corner.
   d. beside the name of the payee.

5. Information mailed to the account holder with the bank statement includes:

   a. bank statement, canceled checks, reconciliation form.
   b. bank statement, outstanding checks, reconciliation form.
   c. bank statement, check stubs, canceled checks.
   d. bank statement, check register, outstanding checks.

6. Cancelled checks should be:

   a. filed along with the corresponding bank statement and reconciliation form.
   b. destroyed immediately.
   c. sent back to the bank.
   d. none of the above.

7. When a check is written for an amount less than a dollar, the amount should be:

   a. circled.
   b. set off in parentheses.

c. written out as "Only **/100".
d. both a and c.

8. When preparing money for a deposit, extra bills that cannot be placed in a wrapper should be:

a. stacked together with the smallest denomination on top.
b. included on an additional deposit slip.
c. listed on the back of the deposit slip.
d. stacked together with the largest denomination on top.

9. Checks are listed on a deposit slip by:

a. entering only the total amount of the checks.
b. recording the top ABA numbers from each check and the amount.
c. recording the person/company who wrote the check and the amount.
d. both b and c.

10. Which of the following is a restrictive endorsement?

a. Pay to the order of
Dr. Mary Ashford
Dr. Colleen Townsend

b. For deposit only
Frady's Sports Center
Acct. No. 24-14092

c. Mary L. Ashford

d. Acct. No. 24-14092
Pay to the order of
Frady's Sports Center

PART 3

DIRECTIONS: List the steps in sequential order for reconciling a bank statement.

PART 4

DIRECTIONS: What six things do you check if the checkbook is not balanced after completing the steps listed above?

PART 1

DIRECTIONS: Match the correct term to the correct definition by placing the letter in the appropriate space.

________ 1. An individual's earnings after deductions have been taken out.

________ 2. A form used for recording the hours an employee works.

________ 3. Another term for Employee's Withholding Exemption Certificate.

________ 4. A form used to indicate marital status and number of exemptions for use in determining payroll deductions.

________ 5. The total amount earned by an employee before taxes or other deductions are taken from it.

________ 6. A form used to summarize the payroll information for all employees.

________ 7. Abbreviation for Federal Insurance Compensation Act.

________ 8. Provides pension for retired persons, survivor benefits for dependents, and hospital and medical insurance for those over 65.

________ 9. Persons paid wages according to the number of hours worked each week.

________10. Persons paid a set amount of money each week or month.

a. Employee's Withholding Exemption Certificate
b. Federal Insurance Compensation Act
c. Gross pay
d. Hourly employees
e. Net pay
f. Payroll register
g. Salaried employees
h. Time card
i. W-4 form
j. FICA

PART 2

DIRECTIONS: Name and define the two types of categories of employees.

1.

2.

PART 3

DIRECTIONS: Name the two types of payroll deductions and give two examples of each.

1.

2.

PART 4

DIRECTIONS: List the two methods of preparing payroll.

1.

2.

PART 1

DIRECTIONS: Match the terms with their definitions by placing the correct letter in blanks at the left.

_______ 1. Manage

_______ 2. S.B.A.

_______ 3. Sole-proprietor

_______ 4. Entrepreneurship

_______ 5. Small business

_______ 6. Entrepreneur

_______ 7. Stockholder

_______ 8. Responsible

_______ 9. Business

_______ 10. Not dominant in its field

a. a place where products and services are sold

b. a new business started by one or more people

c. a person who starts or buys a business

d. being responsible for a business

e. making decisions and deciding how something is to be done

f. Small Business Administration

g. a person who is the only owner of a business

h. the sales of a business being only a small amount of the total sales in its field

i. a person who owns part of a business

j. a business that is independently owned, independently managed, and not dominant in its field.

PART 2

DIRECTIONS: Complete the following statements by selecting the correct choice below. Place the correct letter in the blank at the left.

_______ 1. Entrepreneurship is:

a. the need for achievement.
b. the organizing, managing, and operating of a small business.
c. the need for independence.

__________ 2. Personality traits of an entrepreneur include:

a. need for achievement.
b. need for independence.
c. self-confidence.
d. high level of activity.
e. courage, curiosity, and creativity.
f. all of the above.

__________ 3. Who should start their own business?

a. Someone who cannot keep a job working for others.
b. Someone who is afraid of taking chances.
c. Someone who wants to control his/her own destiny.

__________ 4. The reasons for starting your own business might include:

a. it might be a way to make more money than you could if you worked for someone else.
b. it would give you the chance to do something different.
c. you might like being your own boss.
d. it would give you the chance to discover if you have the ability to do something on your own.
e. it would allow you to help society by providing new services.
f. all of the above.

PART 3

DIRECTIONS: Answer the following statements true or false by placing a T for True or an F for False in the space at the left.

__________ 1. Establishing good credit policies is important in operating a business..

__________ 2. There are no government regulations for new businesses.

__________ 3. Twenty-five percent of all new businesses fail within the first two years of operation.

__________ 4. There is little risk involved in starting a new business.

__________ 5. There are many types of businesses -- some provide services; others produce products.

__________ 6. Professionals are ready to help you in areas you may not know about.

__________ 7. A socialistic economic system depends heavily on government to make decisions.

__________ 8. Communistic economic systems allow some private ownership.

__________ 9. A capitalistic economic system is based on private ownership.

__________ 10. Democracy cannot be part of a socialist economy.

__________ 11. Democracy can be part of a communistic economy.

PART 4

DIRECTIONS: Identify the five major free enterprise factors in our economic system by completing the sentences. Use the words listed below which describe the factor.

Profit
Free market
Ownership of private property
Rights of the people
Competition

1. When individuals want to use their resources to earn money, this is called ____________________.

2. A right to develop your own business, run it, operate it in an open economy, and make a profit from it is called the ____________________ in a free enterprise system.

3. In America, we have a legal right to own factories, offices, stores, and businesses; this is called ____________________.

4. ____________________ can create the development of new or improved goods and services.

5. In a ____________________, people produce what they think they can sell; they make profits, but also accept any losses that may occur.

PART 5

DIRECTIONS: Answer the statements below that describe things that keep our free enterprise economy in balance by writing T for True or F for False in the blanks at the left.

__________ 1. Crop failures can cause a change in our economy.

__________ 2. The law of supply and demand affects the price of goods and services.

__________ 3. Employment is not that important to a balanced economy.

__________ 4. New jobs are caused by shifts in the demand for goods and services.

__________ 5. Creation of new technologies causes changes in our economy.

__________ 6. The law of supply and demand affects the employment in our economy.

FINANCIAL MANAGEMENT/ELECTRONIC CALCULATOR/ANSWER SHEET

ACTIVITY ONE

A.

1. 2974
2. 2776
3. 2856
4. 2685
5. 2865

B.

1. 3864
3. 3312
3. 3940
4. 3673
5. 3638

C.

1. 1263
2. 1597
3. 3349
4. 2071
5. 2321

D.

1. 2336
2. 2639
3. 2823
4. 2594
5. 2817
6. 2623
7. 2311
8. 2554
9. 2633
10. 3792

ACTIVITY TWO

A.

1. 138
2. 190
3. 296
4. 62
5. 604
6. 880
7. 843
8. 863
9. 596
10. 1855

B.

1. -267
2. -257
3. - 47
4. - 65
5. -248
6. -511
7. -246
8. -255
9. -162
10. - 23

ACTIVITY THREE

A.

1. 118.57
2. 587.50
3. 875.01
4. 80.50
5. 194.03

B.

1. 517.13
2. 4751.65
3. 322.11
4. 44.44
5. 50.28

FINANCIAL MANAGEMENT/ELECTRONIC CALCULATOR/ANSWER SHEET (continued)

ACTIVITY FOUR

A.		B.	
1.	90	1.	1200
2.	360	2.	300
3.	31.25	3.	43.92
4.	1.60	4.	8988
5.	24.45	5.	9996
6.	27,025	6.	260
7.	3389.40	7.	1170
8.	10,452	8.	13
9.	1875	9.	21.45
10.	58.08	10.	585

ACTIVITY FIVE

A.		B.	
1.	25	1.	13
2.	5	2.	40.50
3.	4.17	3.	34.64
4.	61.07	4.	22.50
5.	2.63	5.	20.64
6.	4.88	6.	43.13
7.	33.33	7.	28.75
8.	30	8.	26.54
9.	286.65	9.	17.25
10.	.75	10.	38.33

ACTIVITY SIX

A.		B.	
1.	10.00	1.	$12.50
2.	50.00	2.	$ 8.60
3.	16.45	3.	$21.00
4.	3.60	4.	$45.00
5.	100.50	5.	$16.50

FINANCIAL MANAGEMENT/ELECTRONIC CALCULATOR/ANSWER SHEET (continued)

ACTIVITY SEVEN

	Discount	Price
1.	$ 4.20	$ 23.80
2.	$ 9.00	$ 141.00
3.	$122.40	$2,937.60
4.	$ 36.00	$ 144.00
5.	$ 7.26	$ 14.74
6.	$ 21.50	$ 21.50
7.	$ 77.76	$ 894.24
8.	$145.60	$1,310.40
9.	$ 55.90	$ 503.10
10.	$ 15.78	$ 773.22

ACTIVITY EIGHT

Total Floor Space = 4190 sq. ft.

Total Rent Expense = $10,256.00

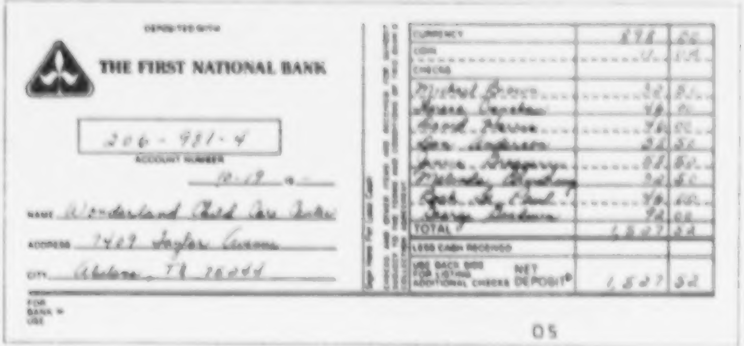
Percent of Total Floor Space	Prorated Share of Rental Expense
Men's Wear = 29%	$2,974.24
Misses = 35%	$3,589.60
Junior Coordinates = 21%	$2,153.76
Junior Dresses = 15%	$1,538.40

UNIT TEST

1. E
2. H
3. A
4. C
5. B
6. G
7. D
8. F
9. index finger
10. thumb
11. ring finger
12. index finger
13. little finger
14. middle finger
15. 1368
16. 1071
17. 2268
18. 725
19. 1001
20. 284
21. 174
22. -2.82
23. 1499
24. -84
25. 13.75
26. 130.62
27. 17,385
28. 760
29. 1273
30. 6.44
31. 24.7
32. 35.03
33. 35.4
34. 223
35. 38

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ANSWER SHEET

ACTIVITY ONE



DEPOSITED WITH

THE FIRST NATIONAL BANK

206 - 981 - 4
ACCOUNT NUMBER

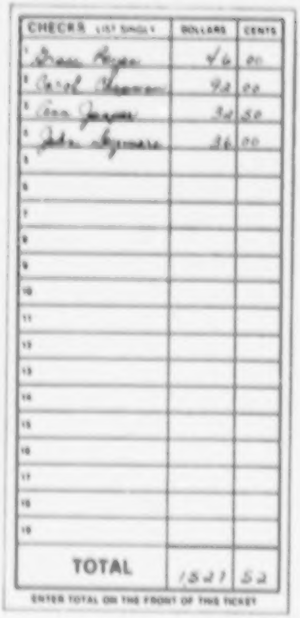
10-19 19--

NAME Wonderland Child Care Center
ADDRESS 7409 Taylor Avenue
CITY Abilene, TX 75244

FOR BANK USE

CURRENCY	898	00
COIN	[illegible]	[illegible]
CHECKS		
Michael Brown	32	50
[illegible]	46	00
[illegible]	36	00
[illegible]	22	50
[illegible]	88	50
[illegible]	32	50
[illegible]	46	00
[illegible]	92	00
TOTAL	1,527	52
LESS CASH RECEIVED		
USE BACK SIDE FOR LISTING ADDITIONAL CHECKS NET DEPOSIT	1,527	52

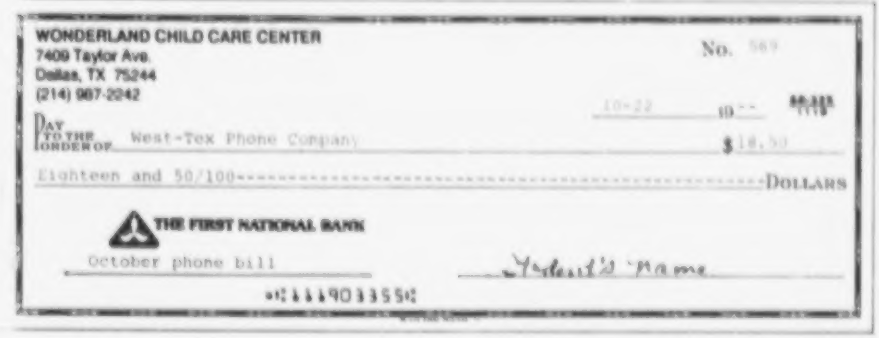
05



CHECKS LIST SINGLY	DOLLARS	CENTS
1 [illegible]	46	00
2 Carol Chapman	92	00
3 [illegible]	32	50
4 [illegible]	36	00
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
TOTAL	1527	52

ENTER TOTAL ON THE FRONT OF THIS TICKET

ACTIVITY TWO



WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 569

10-22 19--

PAY TO THE ORDER OF West-Tex Phone Company $ 18.50

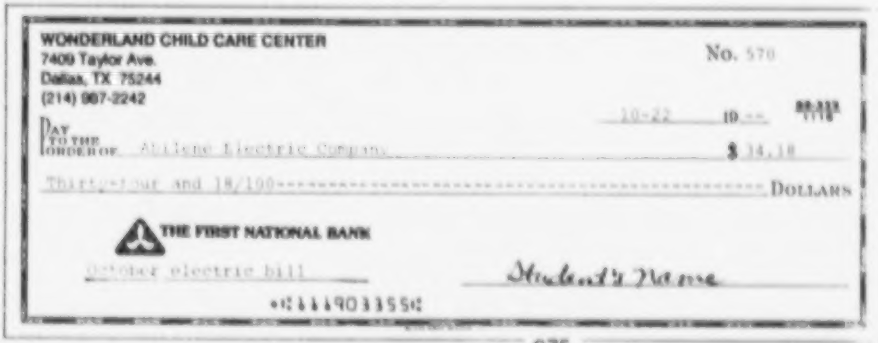
Eighteen and 50/100 DOLLARS

THE FIRST NATIONAL BANK

October phone bill

Student's Name

⑆111903355⑆



WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 570

10-22 19--

PAY TO THE ORDER OF Abilene Electric Company $ 34.18

Thirty-four and 18/100 DOLLARS

THE FIRST NATIONAL BANK

October electric bill

Student's Name

⑆111903355⑆

BEST COPY AVAILABLE

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ANSWER SHEET (continued)

ACTIVITY TWO

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 571

10-22 19 --   80-332 / 1119

PAY TO THE ORDER OF Food-Mart Grocery $ 267.35

Two hundred sixty-seven and 35/100------------------------------------DOLLARS

THE FIRST NATIONAL BANK

Food

Student's Name

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 572

10-22 19 --   80-332 / 1119

PAY TO THE ORDER OF Calvin Produce Company $ 96.00

Ninety-six and no/100--DOLLARS

THE FIRST NATIONAL BANK

Produce

Student's Name

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 573

10-22 19 --   80-332 / 1119

PAY TO THE ORDER OF Dan's Dairy $ 65.40

Sixty-five and 40/100--DOLLARS

THE FIRST NATIONAL BANK

Dairy products

Student's Name

•:111903355:

WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Dallas, TX 75244
(214) 987-2242

No. 574

10-22 19 --   80-332 / 1119

PAY TO THE ORDER OF Joy's Toy Store $ 58.48

Fifty-eight and 48/100---DOLLARS

THE FIRST NATIONAL BANK

Playground equipment

Student's Name

•:111903355:

BEST COPY AVAILABLE

FINANCIAL MANAGEMENT/BANKING PROCEDURES/ANSWER SHEET (continued)

ACTIVITY THREE

CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK	✓	AMOUNT OF DEPOSIT	BALANCE FORWARD	15,238 49
		To Calvin Produce				Check or Dep	-43 20
559	9/28	For vegetables	43 20	✓		Bal	15195 29
		To Dan's Dairy				Check or Dep	-46 86
560	9/30	For milk	46 86			Bal	15148 43
		To Foodmart Grocery				Check or Dep	-116 25
561	10/2	For groceries	116 25			Bal	15032 18
		To Evan's Heating & Plumbing				Check or Dep	-1047 31
562	10/2	For repairs	1,047 31			Bal	13,984 87
		To				Check or Dep	+347 06
	10/6	For			347 06	Bal	14,331 93
		To Harry's Auto Repair				Check or Dep	-128 18
563	10/6	For repairs on van	128 18			Bal	14203 75
		To Abilene Water Dept				Check or Dep	-37 50
564	10/9	For water bill	37 50			Bal	14,166 25
		To				Check or Dep	+409 20
	10/16	For			409 20	Bal	14575 45
		To Foodmart Grocery				Check or Dep	-261 00
565	10/16	For grocery	261 00			Bal	14314 45
		To Abilene Gas Co				Check or Dep	-41 03
566	10/16	For gas bill	41 03			Bal	14273 42
		To Abilene Daily Journal				Check or Dep	-6 95
567	10/16	For advertisement	6 95			Bal	14266 47
		To				Check or Dep	+388 62
	10/16	For			388 62	Bal	14655 09
		To Corky Insurance Agency				Check or Dep	-29 79
568	10/19	For premium	29 79			Bal	14625 30
		To				Check or Dep	+1527 52
	10/19	For			1,527 52	Bal	16,152 82
		To West Tex Phone Company				Check or Dep	-18 50
569	10/22	For Oct phone bill	18 50			Bal	16,134 32
		To Abilene Electric Company				Check or Dep	-34 18
570	10/22	For Oct electric bill	34 18			Bal	16,100 14
		To Food Mart Grocery				Check or Dep	-267 35
571	10/22	For groceries (food)	267 35			Bal	15832 79
		To Calvin Produce Company				Check or Dep	-96 00
572	10/22	For produce	96 00			Bal	15736 29
		To Dan's Dairy				Check or Dep	-65 40
573	10/22	For dairy products	65 40			Bal	15671 39
		To Joy's Toy Store				Check or Dep	-58 48
574	10/22	For playground equip	58 48			Bal	15612 91
		To				Check or Dep	
		For				Bal	
		To				Check or Dep	
		For				Bal	
		To				Check or Dep	
		For				Bal	
		To				Check or Dep	
		For				Bal	

ACTIVITY FOUR

CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK	✓	AMOUNT OF DEPOSIT	BALANCE FORWARD	15,238 49
		To Calvin Produce				Check or Dep	-43 20
559	9/28	For vegetables	43 20	✓		Bal	15195 29
		To Dan's Dairy				Check or Dep	-46 86
560	9/30	For milk	46 86	✓		Bal	15148 43
		To Foodmart Grocery				Check or Dep	-116 25
561	10/2	For groceries	116 25	✓		Bal	15032 18
		To Evan's Heating & Plumbing				Check or Dep	-1047 31
562	10/2	For repairs	1,047 31	✓		Bal	13,984 87
		To				Check or Dep	+347 06
	10/6	For		✓	347 06	Bal	14,331 93
		To Harry's Auto Repair				Check or Dep	-128 18
563	10/6	For repairs on van	128 18	✓		Bal	14203 75
		To Abilene Water Dept				Check or Dep	-37 50
564	10/9	For water bill	37 50	✓		Bal	14,166 25
		To				Check or Dep	+409 20
	10/16	For		✓	409 20	Bal	14575 45
		To Foodmart Grocery				Check or Dep	-261 00
565	10/16	For grocery	261 00	✓		Bal	14314 45
		To Abilene Gas Co				Check or Dep	-41 03
566	10/16	For gas bill	41 03	✓		Bal	14273 42
		To Abilene Daily Journal				Check or Dep	-6 95
567	10/16	For advertisement	6 95	✓		Bal	14266 47
		To				Check or Dep	+388 62
	10/16	For		✓	388 62	Bal	14655 09
		To Corky Insurance Agency				Check or Dep	-29 79
568	10/19	For premium	29 79	✓		Bal	14625 30
		To				Check or Dep	+1527 52
	10/19	For		✓	1,527 52	Bal	16,152 82
		To West-Tex Phone Company				Check or Dep	-18 50
569	10/22	For Oct phone bill	18 50	✓		Bal	16,134 32
		To Abilene Electric Company				Check or Dep	-34 18
570	10/22	For Oct electric bill	34 18	✓		Bal	16100 14
		To Food Mart Grocery				Check or Dep	-267 35
571	10/22	For groceries (food)	267 35			Bal	15832 79
		To Calvin Produce Company				Check or Dep	-96 00
572	10/22	For produce	96 00			Bal	15736 29
		To Dan's Dairy				Check or Dep	-65 40
573	10/22	For dairy products	65 40			Bal	15671 39
		To Joy's Toy Store				Check or Dep	-58 48
574	10/22	For playground equip	58 48	✓		Bal	15612 91
		To				Check or Dep	4 60
		For Service charge	4 60	✓		Bal	15608 31
		To				Check or Dep	
		For				Bal	
		To				Check or Dep	
		For				Bal	
		To				Check or Dep	
		For				Bal	

ACTIVITY FOUR

IN ACCOUNT WITH

THE FIRST NATIONAL BANK

ON	YOUR BALANCE WAS	NO	WE SUBTRACTED CHECKS TOTALING	LESS ACTIVITY CHARGE	NO	WE ADDED DEPOSITS OF	MAKING YOUR PRESENT BALANCE
9/30	$15,195.29	17	$1,826.03	$4.60	4	$2,672.40	$16,037.06

DATE	CHECKS			DEPOSITS	BALANCE
10/02	46.86 ·				15,148.43
10/05	116.25 ·				15,032.18
10/06	1,047.31 ·			347.06 ·	14,331.93
10/13				409.20 ·	14,741.13
10/14	128.18 ·	37.50 ·			14,575.45
10/16				388.62 ·	14,964.07
10/19	41.03 ·	261.00 ·	6.95 ·		14,655.09
10/20				1,527.52 ·	16,182.61
10/21	29.79 ·				16,152.82
10/26	18.50 ·	34.18 ·			16,100.14
10/28	58.48 ·				16,041.66
10/30	4.60S				16,037.06

PLEASE EXAMINE AT ONCE. If no error is reported within ten days, the account will be considered correct. PLEASE NOTIFY BANK IN WRITING OF CHANGE OF ADDRESS

D = AUTOMATIC DRAFT I = INTEREST DEPOSIT M = DEBIT MEMO OD = OVERDRAFT R = REVERSING ENTRY S = SERVICE CHARGE

BEST COPY AVAILABLE

ACTIVITY FOUR

THIS IS PROVIDED TO HELP YOU BALANCE YOUR BANK STATEMENT.

BANK BALANCE SHOWN ON THIS STATEMENT $ 16,037.06

ADD + (IF ANY) DEPOSITS NOT SHOWN ON THIS STATEMENT ________

TOTAL 16,037.06

SUBTRACT − (IF ANY) CHECKS OUTSTANDING 428.75

BALANCE $ 15,608.31

SHOULD AGREE WITH YOUR CHECKBOOK BALANCE

CHECKS OUTSTANDING		
NO.	AMOUNT	
571	267	35
572	96	00
573	65	40
TOTAL	428	75

THIS IS PROVIDED TO HELP YOU BALANCE YOUR CHECKBOOK

CHECKBOOK BALANCE AT STATEMENT DATE $ 15,612.91

SUBTRACT − (IF ANY) ACTIVITY CHARGE 4.60

SUB-TOTAL 15,608.31

SUBTRACT − (IF ANY) OTHER BANK CHARGES ________

BALANCE $ 15,608.31

SHOULD AGREE WITH YOUR STATEMENT BALANCE

IF YOUR ACCOUNT DOES NOT BALANCE--
PLEASE CHECK THE FOLLOWING CAREFULLY

☐ HAVE YOU CORRECTLY ENTERED THE AMOUNT OF EACH CHECK ON YOUR CHECKBOOK STUBS?

☐ ARE THE AMOUNTS OF YOUR DEPOSITS ENTERED ON CHECKBOOK STUBS THE SAME AS IN YOUR STATEMENT?

☐ HAVE ALL CHECKS BEEN DEDUCTED FROM YOUR STUBS?

☐ HAVE YOU DEDUCTED ALL BANK CHARGES FROM YOUR STUBS?

☐ HAVE YOU CARRIED THE CORRECT BALANCE FORWARD FROM ONE CHECKBOOK STUB TO THE NEXT?

☐ HAVE YOU CHECKED ALL ADDITIONS AND SUBTRACTIONS ON YOUR CHECKBOOK STUBS?

BEST COPY AVAILABLE

FINANCIAL MANAGEMENT/BANKING PROCEDURES/UNIT TEST/ANSWER SHEET

UNIT TEST

PART 1

1.	K	7.	G
2.	J	8.	A
3.	L	9.	B
4.	E	10.	H
5.	F	11.	I
6.	D	12.	C

PART 2

1.	c	6.	a
2.	d	7.	d
3.	b	8.	a
4.	b	9.	d
5.	a	10.	b

PART 3

1. Compare the amount shown on each canceled check with the amount shown on the bank statement. Place a check mark next to each figure on the bank statement that matches the canceled check.

2. Compare the deposits listed on the bank statement with those listed on the check register or check stubs. Place a check mark on the bank statement and the register or stub for each matching deposit. Make a list of all deposits in transit.

3. Arrange the checks in numeric order and compare them with the stubs or register. Place a check mark next to each check listed in the register or stubs for which there is a canceled check. Make a list of all outstanding checks.

4. Balance the checkbook. Use a reconciliation form or plain paper. Record the balance from the bank statement. Add any deposits in transit. Subtract the total amount of the outstanding checks from the sum of the bank balance and uncredited deposits to get the adjusted bank balance. This should agree with the balance in the checkbook.

5. Double check the adjusted bank balance. Record the checkbook balance. Subtract any activity or miscellaneous bank charges from that figure to get the adjusted checkbook balance. This should agree with the balance shown on the bank statement.

6. If the checkbook is balanced, the figures found after following this process will be the same. The last figure recorded in the checkbook will also match these two figures.

PART 4

1. Has the amount of each check on the checkbook stubs or in the check register been entered correctly?

2. Are the amounts of the deposits entered on the checkbook stubs or in the register the same as those shown on the statement?

3. Have all checks been deducted from the check stubs or from the register?

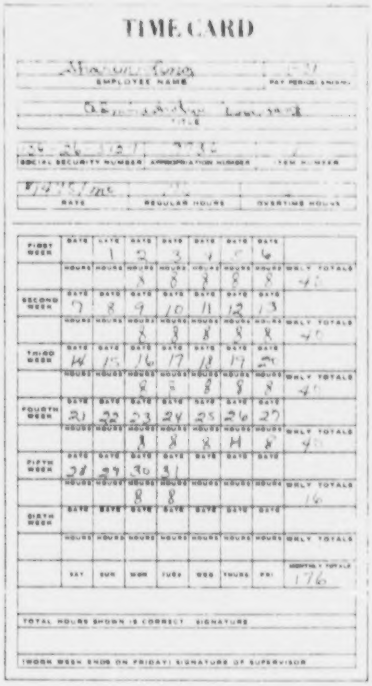
4. Have all bank charges been deducted from the check stubs or from the register?

5. Has the correct balance been carried forward from one checkbook stub to another or from one page in the register to another?

6. Are all additions and subtractions in the register or on the check stubs correct?

FINANCIAL MANAGEMENT/PAYROLL PROCEDURES/ANSWER SHEET

ACTIVITY ONE



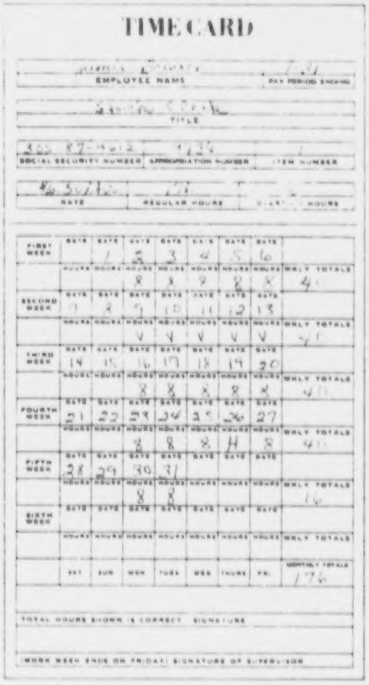
TIME CARD

EMPLOYEE NAME	[illegible]
PAY PERIOD ENDING	[illegible]
TITLE	[illegible]
SOCIAL SECURITY NUMBER	[illegible]
APPROPRIATION NUMBER	[illegible]
ITEM NUMBER	[illegible]
RATE	[illegible]
REGULAR HOURS	[illegible]
OVERTIME HOURS	

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS 40
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS 16
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS 176

TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



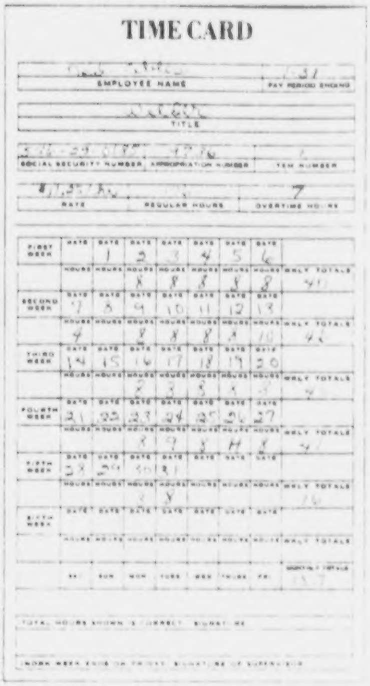
TIME CARD

EMPLOYEE NAME	[illegible]
PAY PERIOD ENDING	1-31
TITLE	[illegible]
SOCIAL SECURITY NUMBER	[illegible]
APPROPRIATION NUMBER	[illegible]
ITEM NUMBER	[illegible]
RATE	[illegible]
REGULAR HOURS	[illegible]
OVERTIME HOURS	[illegible]

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS V	HOURS V	HOURS V	HOURS V	HOURS V	WKLY TOTALS 40
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS 40
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS 16
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS 176

TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



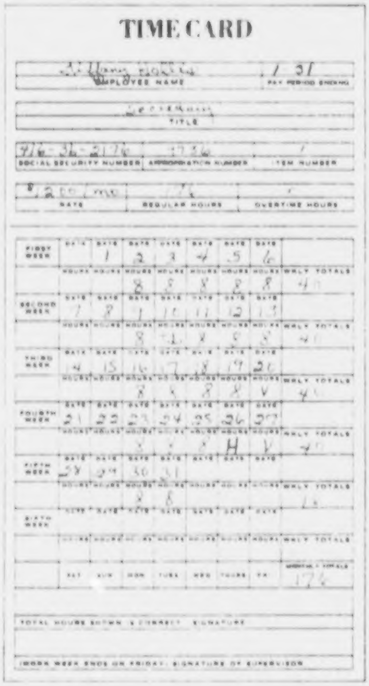
TIME CARD

EMPLOYEE NAME	[illegible]
PAY PERIOD ENDING	1-31
TITLE	[illegible]
SOCIAL SECURITY NUMBER	[illegible]
APPROPRIATION NUMBER	[illegible]
ITEM NUMBER	[illegible]
RATE	[illegible]
REGULAR HOURS	[illegible]
OVERTIME HOURS	7

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS 4	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 10	WKLY TOTALS 42
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 9	HOURS 8	HOURS H	HOURS 8	WKLY TOTALS 41
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS 16
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS [illegible]

TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR



TIME CARD

EMPLOYEE NAME	[illegible]
PAY PERIOD ENDING	1-31
TITLE	[illegible]
SOCIAL SECURITY NUMBER	416-36-2176
APPROPRIATION NUMBER	[illegible]
ITEM NUMBER	1
RATE	[illegible]
REGULAR HOURS	[illegible]
OVERTIME HOURS	[illegible]

FIRST WEEK	DATE	DATE 1	DATE 2	DATE 3	DATE 4	DATE 5	DATE 6	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
SECOND WEEK	DATE 7	DATE 8	DATE 9	DATE 10	DATE 11	DATE 12	DATE 13	
	HOURS	HOURS	HOURS 8	HOURS [illegible]	HOURS 8	HOURS 8	HOURS 8	WKLY TOTALS 40
THIRD WEEK	DATE 14	DATE 15	DATE 16	DATE 17	DATE 18	DATE 19	DATE 20	
	HOURS	HOURS	HOURS 8	HOURS [illegible]	HOURS 8	HOURS 8	HOURS V	WKLY TOTALS 40
FOURTH WEEK	DATE 21	DATE 22	DATE 23	DATE 24	DATE 25	DATE 26	DATE 27	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS 8	HOURS H	HOURS V	WKLY TOTALS 40
FIFTH WEEK	DATE 28	DATE 29	DATE 30	DATE 31	DATE	DATE	DATE	
	HOURS	HOURS	HOURS 8	HOURS 8	HOURS	HOURS	HOURS	WKLY TOTALS 16
SIXTH WEEK	DATE	DATE	DATE	DATE	DATE	DATE	DATE	
	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	WKLY TOTALS
	SAT	SUN	MON	TUES	WED	THURS	FRI	MONTHLY TOTALS 176

TOTAL HOURS SHOWN IS CORRECT SIGNATURE

(WORK WEEK ENDS ON FRIDAY) SIGNATURE OF SUPERVISOR

BEST COPY AVAILABLE

FINANCIAL MANAGEMENT/PAYROLL PROCEDURES/ANSWER SHEET

ACTIVITY TWO

Employee's Earnings Record

NAME Sharon [illegible]
SINGLE ____ MARRIED x
ADDRESS 1505 Jackson
Dallas, TX [illegible]
SOCIAL SECURITY NO. 136-26-3127
POSITION Administrative Asst.
NO. OF EXEMPTIONS 2
WAGES $1475/mo.
O/T WAGE ____

PAY PERIOD ENDING	GROSS PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
1. 1/31/--	1475.00	[illegible]	$19[illegible].20	$15.65	$11.0[illegible]	[illegible].81
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
TOTAL						

Summary

QUARTERS	TOTAL PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
FIRST						
SECOND						
THIRD						
FOURTH						
TOTAL FOR YEAR						

Employee's Earnings Record

NAME Jamie Brown
SINGLE x MARRIED ____
ADDRESS 2929 Bengal Dr., Apt. 610
Dallas, TX 75207
SOCIAL SECURITY NO. 305-87-961[illegible]
POSITION Stock Clerk
NO. OF EXEMPTIONS 1
WAGES $6.50
O/T WAGE $9.7[illegible]

PAY PERIOD ENDING	GROSS PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
1. 1/31/--	$1144.00	$76.08	$189.20	$22.37		$6[illegible].[illegible]
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
TOTAL						

Summary

QUARTERS	TOTAL PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
FIRST						
SECOND						
THIRD						
FOURTH						
TOTAL FOR YEAR						

Employee's Earnings Record

NAME Ned Ables
SINGLE ____ MARRIED x
ADDRESS 6001 Victor Drive
Dallas, TX [illegible]
SOCIAL SECURITY NO. 576-29-0185
POSITION Welder
NO. OF EXEMPTIONS 1
WAGES $11.25
O/T WAGE $16.88

PAY PERIOD ENDING	GROSS PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
1. 1/31/--	$2028.10	[illegible]	[illegible]		$9.78	$120.64
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
TOTAL						

Summary

QUARTERS	TOTAL PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
FIRST						
SECOND						
THIRD						
FOURTH						
TOTAL FOR YEAR						

Employee's Earnings Record

NAME Tiffany Hollis
SINGLE X MARRIED ____
ADDRESS 2741 Park St.
Dallas, TX [illegible]
SOCIAL SECURITY NO. 41[illegible]-36-21[illegible]
POSITION Secretary
NO. OF EXEMPTIONS 1
WAGES $1200/mo.
O/T WAGE ____

PAY PERIOD ENDING	GROSS PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
1. 1/31/--	$1200.00	$79.80	$210.00	$22.37		[illegible]
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
TOTAL						

Summary

QUARTERS	TOTAL PAY	FICA	FEDERAL INCOME TAX	HEALTH INS.	DISABILITY INS.	RETIREMENT
FIRST						
SECOND						
THIRD						
FOURTH						
TOTAL FOR YEAR						

BEST COPY AVAILABLE

ACTIVITY THREE

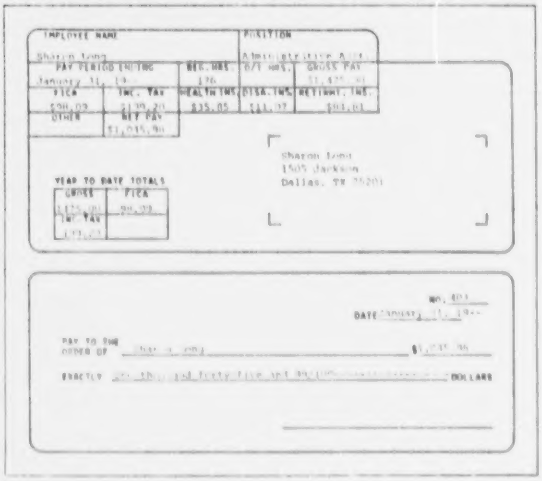
PAYROLL REGISTER

PAY PERIOD ENDING ______________, 19___

EMPLOYEE NAME	SOCIAL SECURITY NUMBER	W.E.*	GROSS PAY	DEDUCTIONS					TOTAL DEDUC-TIONS	NET PAY
				FICA	FEDERAL INCOME TAX	HEALTH INS.	DISA INS.	RETIRE-MENT		
Sharon Long	136-26-3127	2	1,475.00	98.09	199.20	35.85	11.07	84.81	429.02	1,045.98
Jamie Brown	305-87-9612	1	1,144.00	76.08	189.20	22.37		65.78	353.43	790.57
Ned Ables	576-29-0185	3	2,098.16	139.53	342.80		9.78	120.64	612.75	1,485.41
Tiffany Hollis	416-36-2176	1	1,200.00	79.80	210.00	22.37		69.00	381.17	818.83

*W.E. = WITHHOLDING EXEMPTIONS

ACTIVITY FOUR



EMPLOYEE NAME			POSITION	
Sharon Long			Administrative A[illegible]	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
January 31, 19--		176		$1,475.00
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
$98.09	$199.20	$35.85	$11.07	$84.81
OTHER	NET PAY			
	$1,045.98			

YEAR TO DATE TOTALS

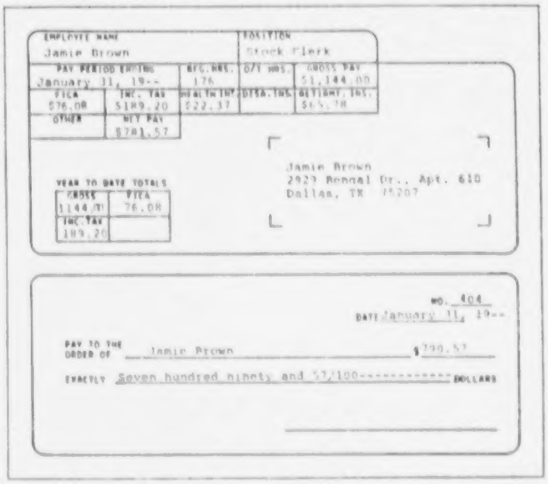
GROSS	FICA
1475.00	98.09
INC. TAX	
199.20	

Sharon Long
1505 Jackson
Dallas, TX 75201

NO. [illegible]
DATE January 31, 19--

PAY TO THE ORDER OF Sharon Long $1,045.98

EXACTLY One thousand forty-five and 98/100-------------------- DOLLARS



EMPLOYEE NAME			POSITION	
Jamie Brown			Stock Clerk	
PAY PERIOD ENDING		REG. HRS.	O/T HRS.	GROSS PAY
January 31, 19--		176		$1,144.00
FICA	INC. TAX	HEALTH INS.	DISA. INS.	RETIRMT. INS.
$76.08	$189.20	$22.37		$65.78
OTHER	NET PAY			
	$790.57			

YEAR TO DATE TOTALS

GROSS	FICA
1144.00	76.08
INC. TAX	
189.20	

Jamie Brown
2923 Bengal Dr., Apt. 610
Dallas, TX 75207

NO. 404
DATE January 31, 19--

PAY TO THE ORDER OF Jamie Brown $790.57

EXACTLY Seven hundred ninety and 57/100------------ DOLLARS

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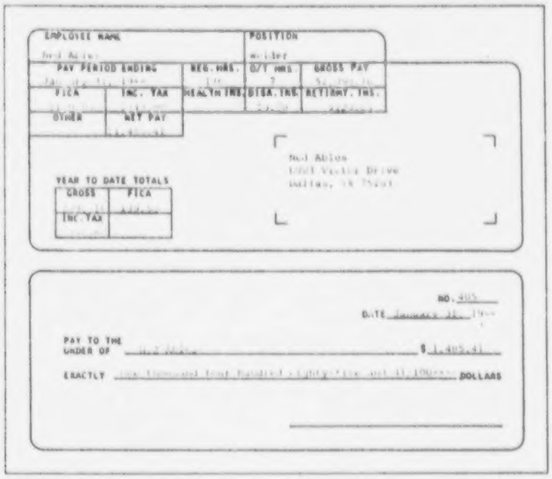
ACTIVITY FOUR (continued)



EMPLOYEE NAME Ned Ablon			POSITION Welder	
PAY PERIOD ENDING [illegible]		REG. HRS. [illegible]	O/T HRS. 2	GROSS PAY [illegible]
FICA [illegible]	INC. TAX [illegible]	HEALTH INS.	DISA. INS. [illegible]	RETIRMT. INS. [illegible]
OTHER	NET PAY [illegible]			

Ned Ablon
[illegible] Vista Drive
Dallas, TX [illegible]

YEAR TO DATE TOTALS

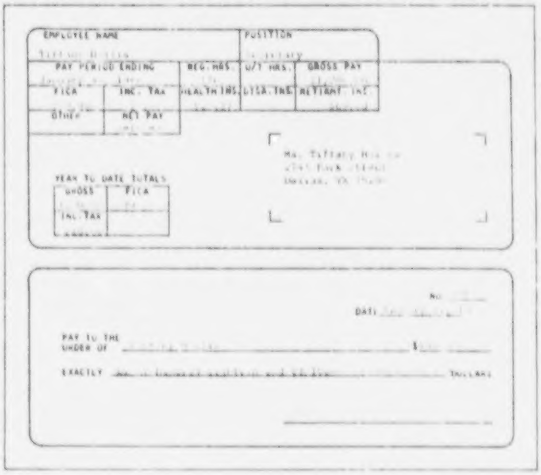
GROSS [illegible]	FICA [illegible]
INC. TAX [illegible]	

NO. 405

DATE January [illegible], 19[illegible]

PAY TO THE ORDER OF Ned Ablon $ 1,485.41

EXACTLY One thousand four hundred eighty-five and 41/100 DOLLARS



EMPLOYEE NAME Tiffany [illegible]			POSITION Secretary	
PAY PERIOD ENDING January [illegible]		REG. HRS. [illegible]	O/T HRS.	GROSS PAY [illegible]
FICA [illegible]	INC. TAX [illegible]	HEALTH INS. [illegible]	DISA. INS.	RETIRMT. INS. [illegible]
OTHER	NET PAY [illegible]			

Ms. Tiffany [illegible]
[illegible]
Dallas, TX [illegible]

YEAR TO DATE TOTALS

GROSS [illegible]	FICA [illegible]
INC. TAX [illegible]	

NO. [illegible]

DATE [illegible]

PAY TO THE ORDER OF [illegible] $ [illegible]

EXACTLY [illegible] DOLLARS

BEST COPY AVAILABLE

UNIT TEST

PART 1

1. e
2. h
3. i
4. a
5. c
6. f
7. j
8. b
9. d
10. g

PART 2

1. Salaried employees -- paid a set amount of money each week or month; mainly executives and professional employees; and are not usually paid overtime.

2. Hourly employees -- paid according to the number of hours worked each week or month; normally laborers and production employees; and are usually paid overtime.

PART 3

1. Involuntary deductions -- Federal Insurance Compensation Act (FICA), Federal income tax, or state and/or local taxes.

2. Voluntary deductions -- health insurance, disability insurance, group life insurance, savings bonds, union dues, or deposits to savings account.

PART 4

1. Manual system
2. Computer system

FINANCIAL MANAGEMENT/ENTREPRENEURSHIP/ANSWER SHEET

ACTIVITY ONE

To be evaluated to the satisfaction of the instructor.

ACTIVITY TWO

To be evaluated to the satisfaction of the instructor.

ACTIVITY THREE

To be evaluated to the satisfaction of the instructor.

UNIT TEST

PART 1

1. d
2. f
3. g
4. b
5. j
6. c
7. i
8. e
9. a
10. h

PART 2

1. b
2. f
3. c
4. f

PART 3

1. T
2. F
3. F
4. F
5. T
6. T
7. T
8. F
9. T
10. F
11. F

PART 4

1. profit
2. rights of the people
3. ownership of private property
4. competition
5. free market

PART 5

1. T
2. T
3. F
4. T
5. T
6. T

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(3)(A)

The student will be provided the opportunity to identify and demonstrate concepts and skills related to management of information flow out of, into, and within an office.

	OBJECTIVE: Understand concepts related to computer-aided preparation and distribution of personalized correspondence, at least including use of mail merge and electronic mail.	MASTERY	NON MASTERY
1.	Describe ways in which information can be obtained or exchanged by means of a computer and a modem.	______	______
2.	Describe procedures for accessing the remote system including the types of services available and costs for use.	______	______
3.	Explain the advantages of using software which permits multiple applications.	______	______
4.	Use a commercial integrated software program to move a file from one application within the package to another.	______	______
5.	Describe the steps in preparing a publication using Desktop Publishing software.	______	______
6.	Describe and/or illustrate forms of a local network and a multi-user system.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

TELECOMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(3)(A)** Understand the concepts related to management of information flow out of, into, and within an office. This will include computer-aided preparation and distribution of correspondence, preparation tools for mass distribution, and transporting images electronically.

LEARNING OBJECTIVE: Understand the exchange of information via telecommunications software.

GENERALIZATION: Modern organizations demand instant response when information is needed for planning and decision making. Workers who know how to use electronic sources of information can be more productive than those who do not.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. ELECTRONIC MAIL A. Uses 1. Networks 2. Distributed systems 3. Bulletin boards B. Types of mail 1. Memos 2. Correspondence 3. Message	1. Watch a demonstration of the use of a modem with a microcomputer, to dial up and log on to a bulletin board, noting the sequence of steps and commands.	1. Describe the ways in which an individual can obtain or exchange information by means of a computer and a modem. Include procedures for accessing the remote system, types of service available and costs or requirements for use.
	2. From a magazine or computer news, develop a list of suitable bulletin boards, based upon available time, cost (free), and subject matter.	
II. REMOTE BULLETIN BOARDS A. Commercial B. Clubs and organizations C. Special interest D. Private	3. Try to log on to several boards from the list, and keep a log of any problems, as well as desirable features of the various boards.	
	4. Use the school library to locate books or articles with information about electronic mail (E-mail), then from information gained, list several examples of practical uses for E-mail.	

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
III. DATA TRANSMISSION A. Digital B. Analog C. Transmission	5. Find which available bulletin boards have E-mail features, and exchange mail between class members by means of one of the boards. 6. Obtain information about on-line information services such as Compu-serve or Startext from User Groups, Computer Stores, or writing for brochures. Compare and contrast the services offered.	

TELECOMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(3)(A)** Understand the concepts related to management of information flow out of, into, and within an office. This will include computer-aided preparation and distribution of correspondence, preparation tools for mass distribution, and transporting images electronically.

LEARNING OBJECTIVE: Understand and use the features of integrated software packages to share data among applications.

GENERALIZATION: As more data is stored on computer media, transfering from one application to another is becoming an everyday requirement even in the smallest offices.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. MODULES A. Spreadsheet B. Database C. Communications D. Graphics E. Word Processor	1. After reading descriptions of several integrated software packages, list each of the individual modules that are included in any or all of the packages.	1. Explain the advantages of using software which permits multiple applications.
II. EXAMPLES A. Lotus 123 B. Framework C. Appleworks D. Others	2. Discuss in class various scenarios in which there is a need to change data from one form to another. Example: names and addresses from a database to a word-processed form letter.	2. Use a commercial integrated software program to move a file from one application within the package to another.
	3. Follow prepared instructions using at least two integrated software packages to move data from one module to another.	
	4. Compare the methods used for integrating data modules by the different products.	
	5. Determine from reference manuals if any of the available packages permit importing of database, spreadsheet, or text information from other software sources.	

TELECOMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(3)(A)** Understand the concepts related to management of information flow out of, into, and within an office. This will include computer-aided preparation and distribution of correspondence, preparation tools for mass distribution, and transporting images electronically.

LEARNING OBJECTIVE: Understand concepts and identify characteristics and uses associated with tools for desktop publishing and generation of presentation graphics.

GENERALIZATION: The mid-eighties has seen a revolution in publishing. Small companies and even home offices now can produce superior quality brochures, manuals, and newsletters, and office workers frequently find themselves in the publishing business.

CONTENT OUTLINE

I. DESKTOP PUBLISHING

- A. Ventura
- B. Pagemaker
- C. Advanced word processors
- D. Newsroom

II. PRESENTATION GRAPHICS

- A. Harvard graphics
- B. "Paint" programs
- C. Integrated graphics
- D. "Windows" programs

III. HARDWARE

- A. Plotter
- B. Scanners
- C. Mouse input
- D. Laser printers

LEARNING EXPERIENCE

1. Collect examples of brochures, booklets, newletters, and other materials that might be composed using a desktop publishing system.

2. Discuss in class the kinds of options and choices that would be required in composing a publication.

3. Use resource materials from the library or classroom to learn how a desktop publishing package, such as Ventura or Pagemaker, is used to combine text and graphics and to format pages for publication.

4. Develop a list of sources from which a desktop publisher might gather materials, such as popular word processors, "paint" programs, digitized graphics, and built-in writing and drawing facilities.

5. Discuss the hardware options, printers and plotters for output, and scanner and mouse for input, that could be used in publishing.

EVALUATION CRITERIA

1. Describe the steps in preparing a publication, using Desktop Publishing software. Include possible sources of publication materials and hardware that might be used for preparing and printing the publications.

TELECOMMUNICATIONS/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
	6. View a demonstration of one of the professional publishing packages, or a personal publishing program such as Newsroom.	
	7. Discuss the meaning and scope of the term "presentation graphics" and identify several examples, such as the graphics portions of some integrated software, and dedicated programs such as Harvard Graphics.	
	8. Observe some of the practical applications of graphics, in addition to desktop publishing, including generation of transparencies and slide presentations.	

TELECOMMUNICATIONS/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(3)(A) Understand the concepts related to management of information flow out of, into, and within an office. This will include computer-aided preparation and distribution of correspondence, preparation tools for mass distribution, and transporting images electronically.

LEARNING OBJECTIVE: Understand the concepts related to networked and multiuser configurations.

GENERALIZATION: Experience with data processed through a networked or multi-user computer at school, the supermarket, the bank, or a medical office is a daily occurance. A knowledge of how the data is exchanged leads to a more informed consumer and an ability to recognize problems that can occur.

CONTENT OUTLINE

I. NETWORKS

- A. Distributed
- B. Local Area (LAN)

II. MULTIUSER SYSTEMS

- A. Time-sharing
- B. Batch Processing
  - 1. Daily sales
  - 2. Payroll
  - 3. Customer billing
- C. Real-time
  - 1. Reservation systems
  - 2. Control of processes

LEARNING EXPERIENCE

1. View a demonstration of a LAN, at a local site, making notes of the procedures for logging on and accessing programs and data files.
2. Discuss the reasons for passwords and access codes when using a network or multi-user system.
3. From a text or reference, find examples of distributed data processing systems and describe the advantages of such a configuration.
4. Visit an installation where batch processing is done from remote locations and describe the kinds of jobs that are being run.
5. Discuss in class the differences between batch and real-time processing and list examples of applications for each kind.

EVALUATION CRITERIA

1. Describe or illustrate the different forms that a local network might take and the forms that a distributed network or multiuser system might take.
2. Classify the types of jobs that are best suited to batch processing, time-sharing, and real-time processing on a multi-user system.

TELECOMMUNICATIONS/RESOURCES

TEXTBOOKS

APPLIED SECRETARIAL PROCEDURES
Gregg Division/McGraw-Hill Book Co.

COMMUNICATIONS STUDY GUIDE, UNIT 1 COMPUTER FUNDAMENTALS FOR AN INFORMATION AGE
Shelly and Cashman

COMPUTERS TODAY
Gregg Division/McGraw-Hill Book Co

THE ELECTRONIC OFFICE
Prentice-Hall

INTRODUCTION TO BUSINESS TELECOMMUNICATIONS
Charles E. Merrill Publishing Co

INTRODUCTION TO COMPUTERS AND INFORMATION PROCESSING
Reston Publishing Co., Inc.

INTENSIVE OFFICE SKILLS REVIEW
South-Western Publishing Co.

OFFICE AUTOMATION
AMACOM

OFFICE PROCEDURES
Gregg Division/McGraw-Hill Book Co.

OFFICE SYSTEMS AND PROCEDURES
Houghton Mifflin

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

SOUTHWESTERN BELL AIDS TO EDUCATION PROGRAM
Southwestern Bell Telephone Co.

TELECOMMUNICATION: CONCEPTS, DEVELOPMENT, AND MANAGEMENT
Bobbs-Merrill Educational Publishers

TELEPHONE COMMUNICATIONS
Prentice-Hall Media, Service Code H

TELEPHONE TECHNIQUES
MTSilady Publishing Co.

PRACTICE SETS

BUSINESS TELEPHONE ETIQUETTE
Slide-Tape Presentation
(Includes teacher's guide, student booklet and competency tests)
Occupational Curriculum Laboratory
East Texas State University

COMMUNICATING ON THE JOB
film, cassettes, teacher manual
Career Aids, Inc.

ELECTRONIC MAIL
Milady Publishing Co.

MICROCOMPUTER ACTIVITIES FOR THE DATA PROCESSING WORK KIT
Gregg Division/McGraw-Hill Book Co.

OFFICE COMMUNICATION
filmstrips, trainee work plan
Prentice-Hall Media

TELEPHONE DYNAMICS
Western Tape

TELEPHONE USE ACTIVITY PACK
Walch

SOFTWARE

THE CALENDAR
Microsoft Solutions
Division of Career Aids, Inc.

ELECTRONIC CALENDAR
IBM Corp.

MANAGING YOUR TIME
Career Aids, Inc.

PFS SOLUTIONS-SCHOOL RECORD KEEPER
Software Publishing Co.

PFS SOLUTIONS-TICKLER
Software Publishing Co.

PFS SOLUTIONS-TICKLER TEMPLATE
Software Publishing Co.

SIDEKICK
Boreland International

TIME-KEEPER
DuraSoft

VISISCHEDULE
VisiCorp

TELECOMMUNICATIONS/UNIT OVERVIEW

I. GENERAL TERMINOLOGY

A. *Batch Processing*: grouping data into batches before any processing takes place. The transactions are gathered over a period of time, then submitted to the computer for processing.

B. *Bulletin Board*: an application of telecommunications where information is made available to subscribers electronically much like a printed newsletter.

C. *Database*: a non-redundant group of related records that allows user-initiated and other types of access.

D. *Distributed Processing*: processing that is done at several locations on several computers that could otherwise be accomplished at a central, single location (computer).

E. *Electronic Mail*: the electronic transmission via communications channels of traditional mail such as letters, memos or messages.

F. *Networking*: linking computers or computer peripherals via communications channels or lines for the purpose of sharing data or information.

G. *On-line Processing*: processing that takes place with the user in direct communication with the computer and as the transaction occurs.

H. *Telecommunications*: the electronic transmission of information, whether it be voice or data.

I. *Voice-Mail*: the transmission of voice with the output being a printed copy. The process of digitizing changes the voice waves into digital signals that can be reproduced by a computer and subsequently a printer.

II. USES OF TELECOMMUNICATIONS

A. Telecommunications encompasses a *wide-range* of *communication activities* from simple interoffice electronic mail to satellite communications around the world.

1. Memos can be sent immediately
2. Eliminates costly copying costs
3. Eliminates possible delays in distribution

B. *Business correspondence* can be sent electronically

1. Electronic mail systems
2. Printed copy is possible at the receiving end

C. *Messages* frequently are transmitted electronically.

556

1. Computer to computer

2. Telephone to computer

3. Speeds up the time of doing business
    a. Caller (or other computer) doesn't have to wait
    b. User can retrieve the message when it is convenient

4. Telecommunication ultimately saves money.
    a. Transmission is fast.
    b. People are better equipped to handle business situations.

D. *Bulletin Boards* - may soon rival newpapers, magazines, and newsletters.

1. Electronically prepared

2. Electronically transmitted

3. Subscribers have continually updated information

4. Commercial - Businesses all over the world have set-up electronic bulletin boards to share information.

5. Clubs and organizations - Members subscribe for the purpose of sharing information.
    a. News such as change of meeting place, date, or time can be distributed more easily, rather than trying to mail or call each individual.
    b. Late-breaking activities can be communicated more effectively.

6. Special interest - Consumer groups, churches, and political groups share bulletin boards for purposes of quickly and easily accessing important information.
    a. Saves time and money
    b. May even prevent potential disasters

7. Private - Many people, in the comfort of their own home, use bulletin board systems to share information.
    a. Recipe sharing
    b. Gardening
    c. Stock market information
    d. Keeping up with friends

E. *On-line Information Services*- Enable users to have immediate access to current information.

1. News - On-line newspapers, magazines, and bulletin boards

2. Education - On-line computer programmed with large databases of information
    a. Many areas of education
    b. Research materials
    c. On-line encyclopedias

3. Financial - Accessing stock market or other financial information
    a. Surveying the stock market trends

    b. Current loan rates or other banking data

III. **ELECTRONIC MAIL** - Electronic Mail is becoming one of the most efficient means of mail distribution, whether interoffice or intercontinental.

- A. *Electronic mail software* - Can be as simple as a messaging capability within the computer's operating system to the very sophisticated correspondence systems that allow world-wide transmission and data handling.
    - 1. Simple messaging system often includes no more than typing the word "mail", then indicating whether you wish to send or receive.
        - a. Sending - you will be prompted for the message and told which key to depress in order to send the message to the selected receiver(s).
        - b. Receiving - the mail temporarily stored within your computer's primary or secondary memory will be displayed on the computer's screen.
        - c. The sender is notified either by a beep or a message that the message has been retrieved.
    - 2. Electronic mail has several configurations based upon the application involved.
        - a. Network - group of computers that are connected via telecommunications channels or telephone lines.
        - b. Using the connection and specialized software, data and information can be exchanged among the various computers.
            - (1) Distributed system configuration is defined as that in which work that could be done on a single computer is divided or "distributed" among two or more computers.
            - (2) Local-area network-computers connected in a close proximity
- B. *Hardware requirements* - There are four requirements for the very basic system:
    - 1. *Personal Computer* - Enables processing necessary for telecommunication via messaging or bulletin board systems.
    - 2. *Modem* - Converts signals sent between computers via telephone lines. The device, a modulator-demodulator or "modem" is required at both sending and receiving ends.
        - a. Data in a computer is a series of numbers.
        - b. Most telephone lines do not communicate in these discrete, measurable terms (counting as they go), but rather in varying waves.
        - c. Modems vary in their capabilities and the speed at which they transmit the information.
    - 3. *Printer* - The receiver may want a printed copy.
        - a. Usually, the data displayed from the sending computer can be "saved" to secondary storage on the receiving computer's disk or tape. Once saved, the information can then be printed.
        - b. Some systems have a "print screen" function which allows anything displayed on the computer's screen to be transferred to the printer. The user may print directly from the screen.
        - c. The type of printer for this operation doesn't matter as long as it is compatible with the computer.
        - d. Terminal/CRT - Personal computers come equipped with a terminal, monitor or CRT as the primary display device.

(1) The type of screen being used must usually be defined for the sending computer because of inconsistencies that may occur because of graphics-equipped displays or color monitors.

(2) Otherwise, any suitable monitor or CRT will suffice.

C. *Other hardware* - For some types of telecommunications, specialized equipment is needed.

D. *Data Transmission* - All data, information, or instructions are stored internally to the computer in a digital or discrete form. There is a code, made up of the binary numbers 0 and 1 to represent every character, number, and special character.

1. Telephonic equipment transmit data in waves, much like sound waves.

2. The discrete (square) signals of the 1's and 0's must be converted (by the modem) into waves that represent the 0's and 1's.

3. The speed at which such transmission can effectively occur depends not only on the devices sending the information, but also upon the type of telephone line (voice or data) used. Most telephone lines will not allow very high speed transmission.

IV. NETWORKS AND MULTIUSER SYSTEMS

A. *Networks*

1. Distributed - processing is accomplished at various locations (computers). Ordinarily, this processing could be accomplished at a central location.
   a. Data is "distributed" among the networked computers for further processing and utilization, depending on the user.
   b. Distributed data is necessary because the processing needs of one location (the main office, for example) may not be the same as that of another (the branch offices, for example).

2. Local Area (LAN) - used within a relatively small geographic area (usually the same office or building). Whereas a distributed network may link nationally or internationally, a LAN is for shorter distances. Messaging and memos are often sent via a LAN.
   a. "File sharing" is also possible.
   b. File sharing often decreases capital expenditures for low-end mirocomputer systems through the sharing of resources.

B. *Multi-user systems*

1. *Time-sharing* - Allows each user (each terminal that is physically attached to the computer) to have immediate access to any and all data within the computer system. The central processing unit allows predetermined slices of time (usually microseconds) for each user's processing to occur.
   a. In addition to sharing the processor, the users of a multi-user system may also share the same files concurrently.
   b. In a LAN, only one user may access a given file at a time.
   c. Given the accessibility of a multi-user system, security measures, such as passwords or access codes, must be installed.

2. *Batch processing* - Groups of transactions are "batched" and processed at one time, usually overnight, after the day's business. Used whenever every record in a file will be processed, usually sequentially.

   a. Daily sales
   b. Payroll
   c. Customer billing

3. *Real-time* - Also called "on-line" or "transaction-oriented processing" because the processing by the computer occurs at the time of the transaction. This is necessary when immediate data or results are imperative.

   a. Reservation systems
   b. Bank withdrawal/deposit systems

V. INTEGRATED SOFTWARE

A. *Modules* of Integrated Software

1. *Spreadsheet* - allows integration of worksheets to either database format or within a word processor for reporting.

2. *Database* - allows for acceptance of information from a spreadsheet and "mail-merge" applications.

   a. Mail-merge enables numerous "orginal form" letters to be prepared for various names and addresses previously stored in a database.
   b. A "form letter" is prepared via the word processor, indicating where the data from the database (name, address, salutation) are to be inserted.
   c. When given the "merge" command, original letters are printed, each with the various recipients' names, addresses, and other personal information. Otherwise, the letters are identical and have only to be typed once in the word processor.

3. *Communications* - allows easy connection to on-line data services, automatic "dialing" of the modem, and simplification of the configurations for enabling bulletin board services.

4. *Graphics* - presentation graphics can be prepared from the spreadsheet module's data.

5. *Word Processing* - enables the reporting of business correspondence composition around spreadsheet-, database-, or graphics-formatted data.

B. *Examples*

1. *Lotus 123* - includes spreadsheet, data management, and graphics.

2. *Lotus Symphony* - includes spreadsheet, database management, word processing, graphics, and communications.

3. *Framework* - includes spreadsheet, database management, word processing, graphics, and communications.

4. *Appleworks* - includes word processing, spreadsheet and database management.

5. Others include *Quattro*, *Enable*, and *Excel*.

TELECOMMUNICATIONS/ACTIVITY ONE

DIRECTIONS: From the list of activities below, indicate which type (by number) of telecommunication activity would be most appropriate.

1. Electronic Mail - memo
2. Electronic Mail - message
3. Electronic Mail - correspondence
4. Bulletin Board - club
5. Bulletin Board - private
6. Bulletin Board - commerical

__________ 1. The garden group wishes to publish a monthly newsletter.

__________ 2. The Inventory Manager wishes to inform managers of the company of a new policy.

__________ 3. A homemaker wishes to try a new recipe.

__________ 4. The principal needs to inform all teachers about a faculty meeting.

__________ 5. A manager needs current stock market information.

__________ 6. A student needs current encyclopedic information.

__________ 7. A secretary has been given the task of sending 100 letters, overnight, to all branch outlets.

__________ 8. The department chairperson wishes to publish a semester calendar of events.

__________ 9. A student wishes to convey a get-well message to a friend with a home computer.

__________10. You do not wish to speak to your teacher, but it is urgent that you get a message to him/her.

TELECOMMUNICATIONS/ACTIVITY TWO

DIRECTIONS: Using an electronic mail system (or simulation), prepare the following memo and send it to at least two users.

April 4, 19xx

To All Department Managers:

Effective immediately, the new supervisor for the loading dock will be Ms. Jane Doe. She is to be congratulated for this promotion and given all the privileges and responsibilities that are compatible with her new position.

R. B.

TELECOMMUNICATIONS/ACTIVITY THREE

DIRECTIONS: Using an Electronic Mail package (or simulation), enter the following calendar of events and send to several users.

CALENDAR OF EVENTS-COMPUTER CLUB

JANUARY

2	MONTHLY MEETING, 7:30
5	BOOTH AT COUNTY FAIR 6:30 - 8:30
10	CAREER DAY AT SW HIGH SCHOOL 10:30
15	CLUB NEW YEARS DANCE - 6:30
20	PLANNING COMMITTEE MEETING - 7:30

FOR MORE INFORMATION ON THE ABOVE EVENTS, CONTACT MY COMPUTER AT 5490084.

T.Y.

DIRECTIONS: From the list below, indicate which of the processing activities would be best suited to batch processing (B) and which would be best suited to on-line (real-time) processing (O).

__________ 1. Processing payroll for 75 employees.

__________ 2. Updating a balance when the customer is paying cash.

__________ 3. Checking inventory for the presence of a part.

__________ 4. Requesting an airline reservation.

__________ 5. Processing the daily sales for commissions.

__________ 6. Depositing your paycheck at the bank.

__________ 7. Printing high school transcripts for all juniors.

__________ 8. Printing a monthly report of sales commissions earned.

__________ 9. Having inventory automatically updated whenever a sale is made.

__________10. Entering the payments of customers.

TELECOMMUNICATIONS/ACTIVITY FIVE

DIRECTIONS: Using an integrated software package, prepare the following word processing document. Save as WORD1.

April 3, 19xx

Dear Mr. Manager,

The following is a proposed budget for our computer club over the next year. Please take a look at it and let me know what you think. Also, if you have any proposed changes before this is presented to the board, please let me know.

Thank You,

The Treasurer

DIRECTIONS: Once you have saved WORD1, prepare the following spreadsheet. Save it as SPREAD1.

BUDGET FOR COMPUTER CLUB

ITEMS	AMOUNT
BOOTH EXPENSE	$200.00
FLIERS	50.00
TRAVEL EXPENSE	50.00
PARTY EXPENSE	100.00
ADVERTISING	20.00
TELEPHONE CALLS	30.00
NEW SOFTWARE FOR LAN	200.00
TOTAL	$650.00
TOTAL DUES EXPECTED	$800.00
SURPLUS	$150.00

When you have saved the spreadsheet, use the instructions for your software package and integrate the spreadsheet after the last paragraph of the letter, but before the closing. Change the name of the new (integrated) document to TOGETHER and save again. Print the final document.

TELECOMMUNICATIONS/ACTIVITY SIX

DIRECTIONS: Enter the following letter, inserting your software's variable indicator where the $ values are shown. Save in the word processor as MAILMERG.ONE

April 14, 19xx

$NAME
$ADDRESS
$CITY, $STATE $ZIP

Dear $NAME;

We are happy to inform you that you have won ten thousand dollars! Your name was selected from thousands of entries for this dubious honor. Please read on to see how you, $NAME, can collect this huge amount of money!

$NAME, you can have the secret to your dreams by simply filling out the enclosed order and mailing it right in. The small stipulation that we require is that your order be for, at least, ten thousand dollars and of course, that you, $NAME enclose a check for ONLY five thousand dollars, WE'LL take care of the rest. Furthermore, $NAME, we will send your order immediately right to $ADDRESS. You hardly have to lift a finger!!!

Please act today, $NAME, so you won't miss out on the remarkable savings available to only you!

Sincerely Yours,

A. True Friend

Using your database module of the integrated software package, create a database with the following fields and enter the below data.

NAME
ADDRESS
CITY
STATE
ZIP

DATA:
Joe Shmoe
345 Any Street
Any Town
TX
78990

Big John
23445 Big Turk
Big Spring
TX
78634

Larry, Moe, Curly
1010 No Where
New York
NY
90887

Save your database and following the instructions with your software package, merge this database with the "form" letter you created above. Print all three letters.

TELECOMMUNICATIONS/UNIT TEST

DIRECTIONS: Match the word with the proper definition:

__________ 1. The electronic transmission of information, whether it be voice or data.

__________ 2. The electronic transmission via communications channels of traditional mail such as letters, memos or messages.

__________ 3. Processing that takes place with the user in direct communication with the computer and as the transaction occurs.

__________ 4. Processing that is done at several locations.

__________ 5. A non-redundant group of related records that allows ease of access.

__________ 6. The transmission of voice with the output being a printed copy.

__________ 7. Linking computers via communications channels for sharing data or information.

__________ 8. Grouping data into batches before any processing takes place.

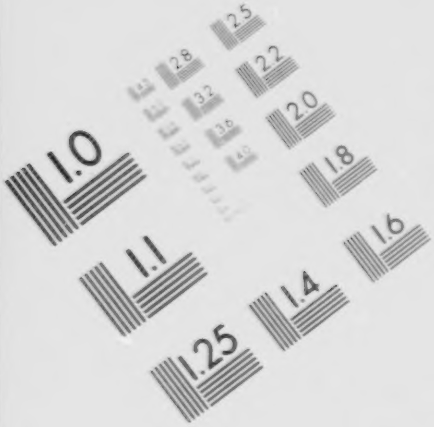
__________ 9. An application of telecommunications where information is made available to subscribers.

A. Electronic mail
B. Voice mail
C. Bulletin board
D. Networking
E. Distributed process
F. Batch processing
G. On-line process
H. Database
I. Telecommunications

10. Name and explain at least three uses for telecommunications.

11. Name and explain the uses of two types of hardware used in telecommunications systems.

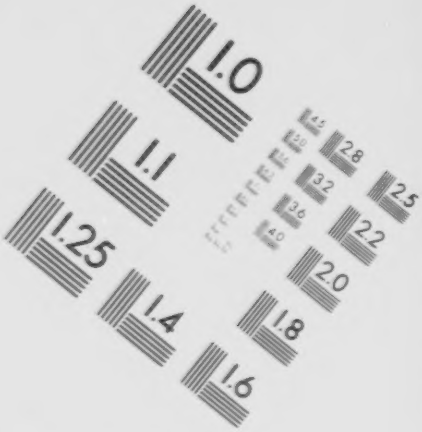
12. What are some uses of integrated software?


1.0
1.1
1.25
1.4
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0
4.5

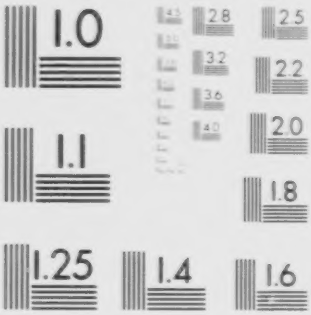
AIIM

Association for Information and Image Management

1100 Wayne Avenue, Suite 1100
Silver Spring, Maryland 20910
301/587-8202


1.0
1.1
1.25
1.4
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0
4.5

Centimeter
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
mm
1
2
3
4
5
Inches


1.0
1.1
1.25
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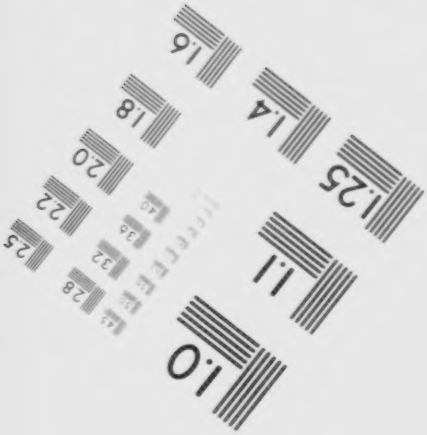
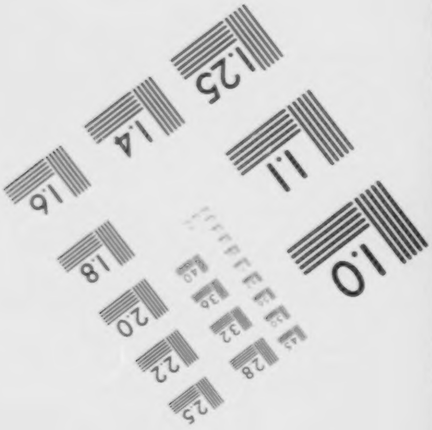
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0
4.5


1.0
1.1
1.25
1.4
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0
4.5


1.0
1.1
1.25
1.4
1.6
1.8
2.0
2.2
2.5
2.8
3.2
3.6
4.0
4.5

MANUFACTURED TO AIIM STANDARDS
BY APPLIED IMAGE, INC.

ACTIVITY ONE

1. 4
2. 2
3. 5
4. 1
5. 6
6. 6
7. 3
8. 4
9. 2
10. 2

ACTIVITIES TWO AND THREE

Evaluated to the satisfaction of the instructor.

ACTIVITY FOUR

1. B
2. O
3. O
4. O
5. B
6. O
7. B
8. B
9. O
10. O

ACTIVITIES FIVE AND SIX

Evaluated to the satisfaction of the instructor

UNIT TEST

1. I
2. A
3. G
4. E
5. H
6. B
7. D
8. F
9 C

10. - 12. Evaluated to the satisfaction of the instructor.

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(3)(B)

The student will be provided opportunities to identify tools for preparing information for mass distribution, at least including desktop publishing, production of presentation graphics,and maintenance of electronic bulletin boards.

OBJECTIVE: Understand, identify, and apply concepts and characteristics concerning the generation of presentation graphics	MASTERY	NON MASTERY
1. Define the scope of the term "presentation graphics" and identify several examples.	______	______
2. Observe practical applications of graphics.	______	______
3. Describe the steps in preparing business presentation graphics.	______	______
4. Prepare a line graph.	______	______
5. Design a pie chart.	______	______
6. Prepare a bar chart.	______	______
7. Using an integrated software package, design a multiple data bar chart with spreadsheet data.	______	______
	______	______
	______	______

STUDENT NAME ________________________________

GRAPHICS/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(3)(B)** Identify tools for preparing information for mass distribution, at least including desktop publishing, reproduction of presentation graphics, and maintenance of electronic bulletin boards.

LEARNING OBJECTIVE: Understand concepts and identify characteristics concerning the generation of presentation graphics.

GENERALIZATION: Graphics software enables large amounts of information or data to be pictorially displayed and more easily understood. Any employee who uses automation in the work environment should have a basic familiarity with the availability and function of presentation graphics software.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. VOCABULARY A. Drawings B. Charts C. Graphs D. Nontext items (music notation) II. TYPES OF OUTPUT A. Display B. Printer C. Plotters	1. Discuss the meaning and scope of the term "presentation graphics" and identify several examples, such as the graphics portions of some integrated software, and dedicated programs such as Harvard Graphics, MacPaint, or even Print Shop. 2. Observe some of the practical applications of graphics, including generation of transparencies and slide presentations. 3. Prepare at least a line graph, and perhaps a pie chart, using an integrated spreadsheet package.	1. Describe the steps in preparing business presentation graphics. This may be integrated into the unit on desktop publishing. Accomplish integration of a graphics presentation using spreadsheet data, completing at least a line graph or pie chart.

GRAPHICS MANAGEMENT/CURRICULUM OUTLINE (Continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
III. BUSINESS GRAPHICS		
A. Pie charts		
B. Bar charts		
C. Line graphs		
D. Grids		
IV. DESIGN GRAPHICS		
A. Hardware		
B. CAD/CAM		
V. BUSINESS USES		
A. Budgeting figures		
B. Sales projections		
C. Planning		

GRAPHICS/RESOURCES

TEXT/WORKBOOKS

APPLICATIONS USING THE PERSONAL COMPUTER
South-Western Publishing Co.

COMPUTER FUNDAMENTALS FOR AN INFORMATION AGE
Anaheim Publishing Company, Inc.

THE ART OF USING COMPUTERS
Boyd & Fraser Publishing Company

IBM GRAPHING ASSISTANT
Instructional Module
Pass Publications

SOFTWARE

3-D CHART
Spectral Graphic Software

ADVERTISING PRINCIPLES
Microcomputer: Apple II
Software Memory Requirements: 32k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

ALPHAGRAPH
Spectral Graphic Software

ART ALA MAC, VOL. 1 and 2
Springboard Software

CADDRAW
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Graphics Printer, Plotter

DATA PLOT
Microcomputer: Apple II
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Graphics Printer and Plotter

DAZZLE DRAW
Broderbund Software

DRAWING ASSISTANT
IBM Personal Computer Division

FANTAVISION
Broderbund Software

FONT MECHANIC
Beagle Bros., Inc.

FONTRIX
Beagle Bros., Inc.

FRAME UP
Beagle Bros., Inc.

GARFIELD
Ahead Designs

GRAPHIC EDGE
Pinpoint Publishing

GRAPHIC PROGRAMMER
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

THE GRAPHICS DEPARTMENT
Sensible Software, Inc.

GRAPHICS LIBRARY, VOL. 1, 2, 3
Broderbund Software

GRAPHWORKS
Pacific Bay International

IMAGEWRITER
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer

KNOWARE, INC.
Microcomputer: Apple II
Software Memory Requirements: 64k
Number of Drives Required: 1
Special Peripheral Equipment Needed: None

MACDRAW
Apple Computer

MACPAINT
Apple Computer

MICROSOFT WORKS
Microsoft

MOUSEPAINT
Apple Computer

NEWSROOM
Springboard Software

PAGEMAKER
Aldus Corporation

PFS: GRAPH
Software Publishing Corp.

PINPOINT
Pinpoint Publishing

PRINTMASTER
Microcomputer: IBM
Software Memory Requirements: 128k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer, DOS
Career Aids, Inc.

THE PRINT SHOP
Microcomputer: Apple
Software Memory Requirements: 48k
Number of Drives Required: 1
Special Peripheral Equipment Needed: Printer
Broderbund Software

SHAPE MECHANIC
Beagle Bros., Inc.

TAKE 1
Baudville

TRIPPLE DUMP
Beagle Bros., Inc.

WALT DISNEY COMIC STRIP MAKER
Career Aids, Inc.

GRAPHICS/UNIT OVERVIEW

I. **VOCABULARY** - Some graphics are extensions of other software, while others are "stand-alone" packages.

  A. *Drawings* - As simple or sophisticated as the software package will allow.

    1. Simple lines with no shading
    2. Complex pictures of equipment or parts, shown in 3-D

  B. *Charts* - Planning documents for forecasting.

    1. Gnatt Charts
    2. Flowcharts
    3. Data Flow Diagrams

  C. *Graphs* - Pictorially representing numbers.

  D. *Nontext Items* - Music notation is one example.

II. **OUTPUT**

  A. *Video Display Screen*

    1. Monochrome - Hercules
    2. Color - RGB, EGA

  B. *Printer* - Dot matrix required.

    1. Color
    2. Monochrome

  C. *Plotters* - For sophisticated line drawings.

III. **BUSINESS GRAPHICS**

  A. *Pie Charts* - Show the various parts of a whole.

    1. Best used to represent one area of data as a unit, broken down into specific pieces.
    2. Available with integrated spreadsheet packages.

  B. *Bar Charts* - Show various data elements in relation to each other.

    1. Allows comparisons of data.
    2. Available with integrated spreadsheet packages.

  C. *Line Graph* - Allows comparison of changing data.

    1. Used for showing changes or patterns of change among various data elements.
    2. Available with integrated spreadsheet packages.

D. *Grid* - Line graph showing vertical as well as horizontal lines for plotting. Allows changing data to be graphed according to two variables.

IV. **DESIGN GRAPHICS** - Used for specialized applications.

A. *Designing, drafting, developing plans*

B. *Graphics terminals*

C. *Track ball/mouse*

D. *Advantages*

    1. As with a word processor, changes to a design can be made within the computer, with no need to redraw the design.
    2. Designs of critical parts can be tested by the computer for stress, air flow problems.

E. *CAD/CAM*

    1. CAD-Computer aided design - using design graphics to develop plans for automobiles, airplanes, or mechanical parts.
    2. CAM-Computer aided manufacturing - using the esign, a robot or similar device can be programmed to make the part or at least pieces of it.

V. **BUSINESS USES**

A. *Budgeting Figures* - Bar charts, using different colors, can be used to compare last year, this year, and next year's figures.

B. *Sales Projections* - A line graph can be used to project sales over a period of time.

C. *Planning* - Charts can be utilized for easy changing and duplicating.

GRAPHICS/ACTIVITY ONE

Directions: Enter the following spreadsheet.

BUDGET FIGURES IN THOUSANDS

ITEMS	THIS YEAR	NEXT YEAR
SALARIES	$20	$50
SUPPLIES	5	7
UTILITIES	10	12
TAXES	7	8
TOTAL	42	77

1. Using the graphics software, prepare a pie chart of the "THIS YEAR" figures. Save the chart for later printing.

2. Prepare a line graph of the two columns of figures. Label the chart "BUDGET COMPARISON" along the base of the chart. Print both the graph and the pie chart.

GRAPHICS/UNIT TEST

Directions: Circle the correct answer.

1. Business graphics utilize which of the following:

   a. Pie charts
   b. Line graphs
   c. Bar charts
   d. All of the above

2. Graphics cannot be displayed on which of the following?

   a. Monochrome monitors
   b. Letter-quality printers
   c. Dot-matrix printers
   d. Color monitors

3. CAD/CAM stands for which of the following?

   a. Computer Aided Development/Computer Aided Moving
   b. Computer Aided Design/Computer Aided Manufacturing
   c. Computer Aided Design/Computer Aided Movement
   d. Computer Aided Drafting/Computer Aided Molting

4. Which specialized hardware is necessary for Design Graphics?

   a. Dot-matrix printer
   b. Track ball or mouse
   c. Color monitor
   d. Optical scanner

Suggest that examination include "hands-on" exercise.

GRAPHICS/ANSWER SHEET

ACTIVITIES

To be evaluated to the satisfaction of the instructor

UNIT TEST

1. d
2. b
3. b
4. b

COMPETENCY CHECKLIST

ESSENTIAL ELEMENT: 75.87(c)(1)(E)

The student will be provided with the opportunity to identify the basic tools and terminology used in the preparation of information intended for mass distribution; it should include, but is not limited to, desktop publishing, production of presentation graphics, and maintenance of electronic bulletin boards.

OBJECTIVE:	Understand the terminology, concepts, and necessary computer components used in desktop publishing.	MASTERY	NON MASTERY
1.	Compare and contrast at least two computers which are best adapted for desktop publishing.	______	______
2.	Discuss the rules for proper balance, being sure to include at least four of the elements of design.	______	______
3.	Discuss the advantages of page layout software.	______	______
4.	Discuss at least three considerations in choosing a printer.	______	______
5.	Define at least five terms relating specifically to desktop publishing and five terms relating to some aspect of printing.	______	______
6.	Compose and format an item for posting on an electronic bulletin board.	______	______
		______	______
		______	______

STUDENT NAME ______________________________

DESKTOP PUBLISHING/CURRICULUM OUTLINE

UNIT OBJECTIVE: **EE 75.87(c)(1)(E)** Identify tools for preparing information for mass distribution, at least including desktop publishing, production of presentation graphics, and maintenance of electronic bulletin boards.

LEARNING OBJECTIVE: Identify and use the terminology related to desktop publishing and understand the components of computer systems, including hardware, operating environments, and application software.

GENERALIZATION: Information processing operators should be able to understand and use desktop publishing terminology on a day-to-day basis.

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
I. TERMINOLOGY	1. Discuss terminology related to desktop publishing.	1. Define terms related to desktop publishing.
		2. Explain the advantages of each type of printer best suited for desktop publishing.
II. EQUIPMENT	2. Write sentences using identified terms in students own words.	
A. Computers	3. View film on desktop publishing techniques.	
1. Microcomputer		
a. Memory size	4. List and tell which computers are best adapted for desktop publishing.	
b. Video display screens		
c. Mouse		
B. Printers		
1. Laser		
2. Dot Matrix		
C. Optical Character Readers (Scanners)		

DESKTOP PUBLISHING/CURRICULUM OUTLINE

UNIT OBJECTIVE: EE 75.87(c)(1)(E) Identify tools for preparing information for mass distribution, at least including desktop publishing, production of presentation graphics, and maintenance of electronic bulletin boards.

LEARNING OBJECTIVE: Demonstrate the operational procedures used in document production and page layout for desktop publishing.

GENERALIZATION: Before a document can be prepared for printing, the page must be designed using the rules for proper balance and visual effect.

CONTENT OUTLINE

I. PAGE DESIGN

- A. Planning
  - 1. Elements of design
    - a. Balance
    - b. Contrast
    - c. Focal points
    - d. White space
    - e. Good functional design
    - f. Focus on the message
  - 2. Graphics
    - a. Charts
    - b. Pictures
    - c. Graphs
  - 3. Type faces
    - a. Helvetica
      - (1) Bold
      - (2) poltalics
    - b. Times
      - (1) Bold
      - (2) Italics

LEARNING EXPERIENCE

1. Review books and newspapers and cut out several page layouts to contrast good and poor page layouts.
2. Using printed text and graphics from newspapers and/or magazines, design a page that looks attractive for publishing. Pick a subject that interests you.
3. Discuss the reasons that the printer asks questions regarding the job.
4. Explain why you should shop for a printer.

EVALUATION CRITERIA

1. Define the terms used in page design.
2. Explain the importance of making a dummy copy of your document for the printer.

DESKTOP PUBLISHING/CURRICULUM OUTLINE (continued)

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA

4. Color and shading
    a. Different shades of the same color
    b. Mixture of color tones

B. Input
1. Printer management software
    a Print formatters
    b. Printer set-up programs
2. Page layout software
    a. Integrates word processing, page design and layout
b. Eliminates the need to cut and paste
c. Saves time and money

II. PREPARING FOR THE PRINTER

A. Who will print the publication
1. In-house photocopy equipment or print shop
2. Professional printer

B. Preparing a dummy page
1. Use page layout software
2. Find format problems
3. Rough model of completed document

C. Important questions the printer will ask
1. What size is the publication?
2. Number of copies to be printed?
3. Price range?
4. Paper size, weight, and color?
5. Print on one or two sides of paper?
6. When will the job be needed?
7. How will you be paying?

CONTENT OUTLINE	LEARNING EXPERIENCE	EVALUATION CRITERIA
D. How to pick a printer		
1. One that is reliable		
2. Has good references		
3. Will work within your price range		
4. Will show you samples of his/her work		

DESKTOP PUBLISHING/RESOURCES

TEXTBOOKS

DESKTOP PUBLISHING FROM A TO Z
Osborne McGraw-Hill Publishing

THE ART OF DESKTOP PUBLISHING
Bantam Books

USING PAGEMAKER
Houghton Mifflin Co.

MAGAZINES

Family and Home Computing
Scholastic Incorporated

Modern Office Technology
Penton Publishing Co.

Office Systems 88
Office Systems Magazine, Inc.
Springhouse Corporation

PC Resource
IDG Communications/Peterborough, Inc.

Personal Computing
Hayden Publishing Co.

Publish
PCW Communications, Incorporated

The Office
Office Publications, Incorporated

The 1988 Guide to Desktop Publishing
Special Supplement to Personal Computing Magazine
Hayden Publishing Co.

DESKTOP PUBLISHING/UNIT OVERVIEW

I. TERMINOLOGY

A. *Balance*: Creating a publication that has a satisfactory arrangement of elements--text, graphics, and white space.

B. *Bold*: A style in a given typeface that is heavier in weight than regular style.

C. *Camera Ready*: Publication in final form, ready to be photographed and printed.

D. *Character*: A single letter, numeral, or other element of a type font.

E. *Contrast*: The use of opposing colors, lines, or typefaces to bring the reader's attention to a point.

F. *Clip Art*: Pre-drawn art available on disk in any number of graphics program formats.

G. *Desktop Publishing*: The writing, assembling, and designing of documents in the office environment using a computer, usually a microcomputer.

H. *Desktop Publishing Software*: Permits you to combine text and graphics, plus control the design of your publication.

I. *DPI*: "Dots per inch" the more dpi the finer the quality of the printout.

J. *Dummy*: A model of a page to be printed with all of the text and illustrations in place; the same as a layout.

K. *Font*: A complete collection of letters, numbers, and character symbols, all of the same size and typeface. Fonts of various sizes make up a typeface.

L. *Graphic*: Any type of illustration such as a graph, picture, or drawing usually done by using graphics software.

M. *Grid*: A design template that divides a page with imaginary vertical and horizontal lines as an aid to placing and aligning type and graphic elements.

N. *Italic*: A type style in which letters are slanted to give a cursive effect.

O. *Laser Printer*: A printing device that uses xerographic process to print text on paper.

P. *Layout*: The placing of parts of a document, text, and graphics on a page; the same as a dummy.

Q. *Mouse*: An input device that rolls around on a small bearing and has one or more buttons on the top. The mouse guides the cursor on a visual display screen in the direction of the mouse's movement.

R. *Page Layout Software*: Computer software that integrates word processing, page design, and layouts.

S *Printer Layout Software*: Allows dot matrix printers to print in more than one typeface and style.

T. *Style Sheet*: In desktop publishing, a file that contains different layout rules, formatting codes, and type specifications.

U. *Type*: The metal elements used to leave a printed image on paper.

V. *Typeface*: A full set of characters, of varying sizes, that make up a particular design such as Helvetica.

W. *White Space*: The white space left on a page to enhance legibility.

II. EQUIPMENT

A. *Hardware* - the components that make up the computer system.

1. *Computer*
    a. *Computer memory* size can range from 512K to 40MB depending on how sophisticated the system.
    b. *Disk drives* may be two (2) floppy diskettes or a hard disk drive system.
    c. *Mouse* is an indicator used to move around within the program instead of using function keys and/or keyboard.

2. *Printers* are a very important component of desktop publishing because they determine the final quality of the output.
    a. *Dot matrix printers* can be used for simple jobs that do not require high quality.
    b. *Laser printer* prices can range from inexpensive to the expensive. The price is determined by their capabilities and the dpi.
        (1) The least expensive prints about 70 dpi while the most expensive will print 300 or more dpi. The more dpi that can be printed the better quality the output.
        (2) Printers can also produce color graphics.
        (3) OCR's (Scanners)

B. *Input Media* - all the software used for inputting information into a document.

1. *Word Processing software* is used to input the text of the words used in a document.
    a. Documents are keyed in and edited using word processing software.
    b. The word processing software must be compatible with the publishing system software.
    c. Popular software packages include:
        (1) *MacWrite* which is for the Apple MACINTOSH only.
        (2) *Microsoft Word* versions are available for the MACINTOSH and the IBM PC's and compatibles.
        (3) *WordStar 2000*
        (4) *PFS: Professional*
        (5) *PFS: First choice*
        (6) *Word Perfect*

2. *Graphics software* is used to produce pictures, graphs, and to scan pictures and photographs into a document. Some popular graphics packages include:

   - a. GEM
   - b. PC Paintbrush
   - c. Desktop Art (Macintosh and IBM PC and compatibles)
   - d. MacDraw (Macintosh)

3. Desktop publishing system software is used to import all the other software into a completed document.

   a. Prices range from under $100 up to $800; the more complicated the packages the more they cost.
   b. When purchasing a software package you must know the amount of money you are willing to spend, what you will be doing with the system, and future plans to expand your publishing operation.
   c. Some popular software packages:

      (1) Aldus Pagemaker available for the APPLE Macintosh or the IBM PC and compatibles.
      (2) Ventura used on IBM PC's and compatibles.
      (3) PFS: Publish used on IBM PC's and compatibles.

III. PAGE DESIGN - THE PAGE-LOOK WHEN LAYOUT IS COMPLETE

The page design should be planned in advance so that it will look attractive, well-balanced, and focus on the message.

A. Prepare a dummy copy of the publication to see how the actual publication will look when printed.

B. Things to look for in the dummy are:

   1. Does the page design focus on the message?

   2. Where are the most important points going to be located?

   3. What should be contrasted?

   4. Is there enough white space on the page?

   5. Does the page look balanced?

IV. PREPARE FOR PRINT - THE LAST STEP IN PREPARING FOR PUBLICATION

A. The printer may be:

   1. In-house photocopy equipment

   2. In-house print shop

   3. Professional print shop

B. Before going to the printer:

   1. How many pages will the publication contain?

2. Are the pages to be printed on one or two sides?
3. How to pay for the printing?
4. How much to spend on the printing?
5. When the publication is to be completed?
6. What is the size of publication?

C. Decisions the printer may help you make:

1. Color and quality of paper
2. Exact cost of printing
3. Completion date
4. Other technical information

D. Take the dummy to the printer so he/she can see how the publication should look.

E. Pick a printer who can work within price range and time constraints.

DESKTOP PUBLISHING/ACTIVITY ONE

DIRECTIONS: Match the terms with the proper definition.

________ 1. LAYOUT

________ 2. GRID

________ 3. ITALIC

________ 4. WHITE SPACE

________ 5. BOLD

________ 6. LASER PRINTER

________ 7. TYPE

________ 8. DESKTOP PUBLISHING

________ 9. DOTS PER INCH

________ 10. CLIP ART

A. The more of these per inch in a printout, the better quality the printout.

B. The placing of the parts of a document on the page.

C. A style of typeface that is heavier in weight than the regular style.

D. Pre-drawn art in any number of graphics program formats.

E. Divides the page with imaginary vertical and horizontal lines.

F. A type style that looks like cursive.

G. The space left on a page to enhance legibility.

H. Metal elements used to leave a printed image on a page.

I. Uses a photocopy process to print text on paper.

J. Writing, designing, and assembling documents using a microcomputer.

DESKTOP PUBLISHING/ACTIVITY TWO

DIRECTIONS: Look in magazines and other publications for different types of type styles, pictures, and/or graphs to bring to class. Using a sheet of paper, paste up a page of "news" on a subject that is interesting to you.

DESKTOP PUBLISHING/UNIT TEST

DIRECTIONS: Match the following terms with the proper definition.

__________ 1. CLIP ART

__________ 2. LASER PRINTER

__________ 3. GRID

__________ 4. GRAPHIC

__________ 5. DESKTOP PUBLISHING

__________ 6. FONT

__________ 7. LAYOUT

__________ 8. MOUSE

__________ 9. STYLE SHEET

__________10. PRINTER LAYOUT SOFTWARE

A. The writing, assembling, and designing of documents in the office environment using a computer, usually a microcomputer.

B. Any type of illustration such as a graph, picture, or drawing usually done by using graphics software.

C. An input device that rolls around on a small bearing and has one or more buttons on the top. It guides the cursor on a visual display screen in the direction of its movement.

D. In desktop publishing, a file that contains different layout rules, formatting codes, and type specifications.

E. Pre-drawn art available on disk in any number of graphics program formats.

F. Allows dot matrix printers to print in more than one typeface and style.

G. A complete collection of letters, numbers, and character symbols, all of the same size and typeface.

H. The placing of parts of a document, text, and graphics on a page; the same as a dummy.

I. A design template that divides a page with imaginary vertical and horizontal lines as an aid to placing and aligning type and graphic elements.

J. A printing device that uses xerographic process to print text on paper.

11. List four popular graphic software packages.

12. Describe the factors involved in page design.

13. Describe the steps in preparing a document for publication.

14. Contrast dot matrix printers and laser printers related to their use with desktop publishing.

15. Describe the components of hardware as it relates to desktop publishing.

DESKTOP PUBLISHING/ANSWER SHEET

ACTIVITY ONE

1. B
2. E
3. F
4. G
5. C
6. I
7. H
8. J
9. A
10. D

ACTIVITY TWO

Evaluated to the satisfaction of the instructor.

UNIT TEST

1. E
2. J
3. I
4. B
5. A
6. G
7. H
8. C
9. C
10. F

11.-15. Evaluated to the satisfaction of the instructor.

APPENDIX A

LESSON PLANS

Because of the nature of the Business Information Processing course, individual lesson plans for each day have not been provided. The sequence of units and production skills in this course are taught in a variety of ways because of the need for each program to meet the needs of its local population. The curriculum outlines at the beginning of each unit provide all of the necessary instructional information for the unit and are designed for your use in preparing lesson plans.

This guide was developed with flexibility, allowing the instructor to teach basic skills in a variety of methods. Although the guide is scoped and sequenced, many units can be incorporated into rotation schedules and individualized. The strategies impemented in teaching this course will depend largely upon the equipment, resources, and instructional materials available.

Three sample lesson plans are provided on the following pages for your use in planning your lessons. Plans for battery units, production skills units, and problem-solving and decision-making are provided. Also included are a model for effective teaching and instructions for sponge activities.

GROUP INSTRUCTION

Several units of Business Information Processing may be taught by group instruction. These units are called battery units. Battery units are units, taught through group instruction, that all students will need regardless of their career objectives. Some of the battery units that could be taught by conventional methods are:

Information Processing in the Automated Office
Successful Employment
Business Communications
Formatting Business Documents
Proofreading
Financial Management
Word Processing Concepts

INDIVIDUALIZED INSTRUCTION

In individualized instruction, the instructor should make sure that students are rotated to all equipment or work stations related to the student's interest or career objective at least once during the year. Students' work should be individualized at these stations. Some students will be able to complete the project within two or three days, while others may not complete the work within a week. Avoid giving the faster student busy work. Try to provide training that will aid in successful implementation of a rotation plan. Practice sets and software packages are ideal for individualized instruction. Units that lend themselves to individualized instruction include the following:

Transcription Skills
Electronic Calculator
Document Production
Keyboarding Skills
Records Management
Successful Employment (Human Relations and Time Management)

INTEGRATED SOFTWARE AND SIMULATIONS

The automated office is rapidly moving towards the systems concept. In this approach many information processing tools are used in an integrated manner. It is important for students to learn to function in this atmosphere. This can be done by the office simulation strategy, using integrated software packages. Units that lend themselves to simulations through the use of integrated software include the following:

Word Processing Concepts
Document Production
Formatting Business Documents
Transcription Techniques
Proofreading Information
Database Management
Electronic Spreadsheet Applications
Telecommunications
Graphics
Desktop Publishing
Successful Employment (Human Relations, Decision-Making, Time Management, and Work Ethics)

EVALUATION

The State Board of Education Rules for Curriculum states that students should be evaluated on a 0-100 scale with 70 and above receiving course credit. At the beginning of the year, you should establish the grading system for your class. Consideration should be given to how individualized instruction, battery instruction, attendance, etc., will affect the students' grades for the grading period.

In evaluating students on their individualized instruction, it is impossible to evaluate each job assigned. Therefore, on some assignments, answer sheets should be given to the students so they may check their answers with the teacher's key. On some assignments, the teacher should grade for specifics. For instance, grade one paper for proofreading, one for typographical errors, one for format, etc. Since students will not be completing the same assignments, students should be given a grade sheet and assignment sheet for each rotation.

LESSON PLAN INFORMATION

A lesson plan is a clearly written, flexible and individualized teacher aid for conducting a class. It is individualized in two senses: (1) it is based on the individual needs, interest and abilities of the students, and (2) it is formatted according to the goals, needs, and style of the teacher. Although forms for writing lesson plans vary, basically there are three major sections to each plan:

1. Lesson approach
2. Lesson developoment
3. Lesson summary

The model for effective teaching on the following page will go into more detail in each of these categories, and present them in the format used by most local school districts.

TIPS FOR LESSON PLAN PREPARATION

1. Know your subject matter.
2. Decide what the student needs to learn.
3. Know your students--their interests and what motivates them.
4. Make sure that the lesson plan provides the opportunity for the students to be aware of the objective for each lesson.
5. Select several teaching methods that are appropriate.
6. Use your common sense to organize your sequence of learning activities.
7. Determine the materials, supplies, and equipment needed.
8. Prepare all handouts, equipment and supplies before class.
9. Determine if the student has learned the information.
10. Reteach, if needed, using another teaching method.
11. Summarize with a closure of the lesson.
12. Develop the evaluation to relate specifically to the objectives.
13. Plan more than what you think is needed.

SAMPLE LESSON PLAN: INFORMATIONAL BATTERY UNIT

ESSENTIAL ELEMENT:

UNIT:

LESSON TOPIC:

OBJECTIVE:

SPONGE ACTIVITY:

Time___________

PURPOSE:

Time___________

METHOD OF INSTRUCTION:

Time___________

LEARNING ACTIVITY:

Time___________

RESOURCES:

EVALUATION:

Time___________

CLOSURE:

Time___________

SAMPLE LESSON PLAN: PRODUCTION SKILLS

UNIT ______________________________

LESSON ______________________________

TASK:

PURPOSE:

EQUIPMENT:

MATERIALS:

TEACHING AIDS:

REFERENCES:

I. PREPARATION (of the students)

II. PRESENTATION (of the skills)

Operations or Steps	Key Points (things to remember to do or say)

III. APPLICATION (practice by students under close supervision)

IV. TEST (performance of skill to acceptable standards)

V. SUGGESTED READING FOR STUDENTS

SAMPLE LESSON PLAN: PROBLEM-SOLVING OR MANAGERIAL

UNIT: Suggested for use with case studies for Human Relations, Decision Making and Priority Setting

LESSON TOPIC:

OBJECTIVE:

PURPOSE: Identification of Problem
Statement of the Objective

Time______________________________

METHOD: (Problem Solving or Managerial)

KEY QUESTIONS TO ASK TO IDENTIFY FACTORS	FACTORS TO BE IDENTIFIED

Time______________________________

RESOURCES: (list of resources for students to use in locating information needed to solve problem)

Time______________________________

CLOSURE: (draw conclusions to the problem)

Time______________________________

EVALUATION:

MODEL FOR EFFECTIVE TEACHING

CURRICULUM

.....Essential Elements
.....Curriculum guides

TASK ANALYSIS

.....Critical learning elements at the level of difficulty necessary to reach the terminal objective
.....Sequential order of related learning steps
.....Daily objectives formed from task analysis

PLAN LESSON

.....Plan methods and strategies
.....Individualize for diagnostic teaching and mastery learning
.....Appropriate level of content
.....Appropriate for different learning styles
.....Include variety of student output

STANDARDS

.....Classroom rules
.....Physical arrangement
.....Management of materials
.....Interaction patterns
.....Procedures for getting ready
.....Sponge activity planned
.....Materials ready for use
.....Use of time on attendance, record keeping, etc.

FOCUS

.....Focus students
.....State objective for learning
.....Establish purpose
.....Establish transfer if possible
.....Provide motivation

EXPLANATION

.....Input - provide information
explanation of concept
state definitions
identify critical attributes
provide examples
.....Model

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.....Check for understanding/comprehension
    - pose key questions
    - ask students to explain concept, definitions, attributes in their own words
    - have students discriminate between examples and non-examples
    - use active participation devices

GUIDED PRACTICE

.....Planned monitored activity under direct teacher supervision
.....Objective directly related to activity
.....Overt responses elicited that demonstrates behavior in objective
.....Provide specific knowledge of results
.....Reteach when required

MONITORING AND ADJUSTING

.....Determine degree of effectiveness
.....Adjust presentation to reach desired learning
.....If constant monitoring and adjusting is not performed, 40 to 80% of class time is wasted
.....Informal testing situation where appropriate

INDEPENDENT PRACTICE

.....Additional practice
.....Follow-up homework related directly to objective
.....Reinforcement of learning
.....Knowledge of results

EXTENSION

.....Enrich learning beyond original concept
.....Bloom's Taxonomy

CLOSURE

.....Teacher summary
.....Student summary
.....Students perform behavior alone

MONITOR AND ADJUST

.....Should be done throughout the entire teaching/learning cycle

SPONGE ACTIVITIES

PURPOSE

The purpose of the sponge activity is to engage students in activities immediately as the class period begins. This allows the teacher to do the housekeeping chores while effectively utilizing time for student involvement.

RULES

1. Always in the same place in the room
2. Starts when the bell rings
3. Independent work
4. Vary uses and strategies
5. Procedure needs to be taught and monitored the first few weeks

USES

1. Check homework
2. Review of previous lesson
3. Diagnosis "pre test"
4. Summary of homework (important points of chapter)
5. Enrichment "brainstorm"

STRATEGIES

1. Individual
2. Partners
3. Group (four people)

BLOOM'S TAXONOMY OF THINKING PROCESSES

LEVEL OF TAXONOMY	DEFINITION	WHAT THE STUDENT DOES	VERBS TO HELP YOU DESIGN ACTIVITIES
Knowledge	Recall or location of specific bits of information	responds absorbs remembers recognizes	tell - list - define name - recall - identify - state know - remember - repeat recognize
Comprehension (understanding)	Understanding of communicated material or information	explains translates demonstrates interprets	transform - change - restate - describe - explain - review - paraphrase - relate - generalize - summarize - interpret - infer - give main idea
Application (using)	Use of rules, concepts, principles, and theories in new situations	solves novel problems demonstrates uses knowledge constructs	apply - practice - employ - use - demonstrate - illustrate - show - report
Analysis (taking apart)	Breaking down information into its parts	discusses uncovers lists dissects	analyze - dissect - distinguish - examine - compare - contrast - survey - investigate - separate - categorize - classify - organize
Synthesis (creating new)	Putting together of ideas into a new or unique product or plan	discusses generalizes relates contrasts	create - invent - compose - construct - design - modify - imagine - produce - propose - what if .....
Evaluation (judging)	Judging the value of materials or ideas on the basis of set standards or criteria	judges disputes forms opinions debates	judge - decide/select/justify - evaluate - critique - debate - verify - recommend - assess

APPENDIX B

ESSENTIAL ELEMENTS

75.87 Office Education

(a) The elements in this subsection are common to office education programs and shall be included in each course at the appropriate level. They are described here to preclude repetition in each course. Every school offering office education shall provide courses which include the following essential elements:

(1) Leadership concepts and skills. The student shall be provided opportunities to:

(A) demonstrate skills, characteristics, and responsibilities of leaders and effective group members;

(B) demonstrate a knowledge of parliamentary procedure principles;

(C) plan and conduct leadership activities; and

(D) prepare for effective citizenship and for participation in our democratic society

(2) Concepts and skills related to successful employment and/or postsecondary training. The student shall be provided opportunities to:

(A) identify employment opportunities and preparation requirements in the chosen field;

(B) identify effective methods to secure and terminate employment;

(C) demonstrate effective communication skills both oral and written and follow through on assigned tasks;

(D) demonstrate dependability and punctuality;

(E) demonstrate productive work habits and attitudes;

(F) understand the importance of taking pride in the quality of work performed;

(G) recognize the dignity in work;

(H) develop skills in planning and organizing work;

(I) apply required methods and sequences when performing tasks;

(J) apply principles of time management and work simplification when performing assigned tasks;

(K) identify ethical practices and responsibilities; and

(L) understand the importance of the application of organizational policies and procedures.

(3) Concepts and skills associated with entrepreneurship. The student shall be provided opportunities to:

(A) identify opportunities for business ownership;

(B) understand the risk and profit motive factor;

(C) understand the elements and advantages of the free enterprise system; and

(D) explain the role of small business in the free enterprise system.

(4) Concepts and skills related to safety and safe working conditions. The student shall be provided opportunities to identify and apply safe working practices to all training situations.

(5) Concepts and skills associated with human relations and personality development. The student shall be provided opportunities to:

(A) understand the importance of maintaining good health and proper appearance for effective job performance;

(B) understand oneself and others;

(C) exercise self-control;

(D) accept and use criticism;

(E) recognize basic human relationships as they relate to business success; and

(F) demonstrate characteristics for successful working relationships.

(6) Concepts and skills related to personal and business management. The student shall be provided opportunities to:

(A) explain how management assists in reaching personal and family goals;

(B) explain the management process;

(C) describe the role of management in controlling stress;

(D) identify and understand personal checking accounts;

(E) identify and understand personal loan application processes;

(F) identify and understand different financial institutions;

(G) identify the role and functions of business management;

(H) understand the lines of authority; and

(I) identify effective supervisory techniques.

(c) Business information processing (one, two, or three units) shall include the following essential elements:

(1) Concepts and skills related to effective communication and production of business documents. The student shall be provided opportunities to:

(A) demonstrate proficiency in business English, spelling, and proofreading;

(B) identify and apply correct format for business correspondence and documents;

(C) demonstrate basic information processing concepts and processes to employ the appropriate steps in document production;

(D) demonstrate proficiency in transcription;

(E) identify and use computer-based tools for document production;

(F) demonstrate basic knowledge and usage of business machines; and

(G) identify proper techniques in business telephone usage.

(2) Concepts and skills related to business records management. The student shall be provided opportunities to:

(A) identify procedures for controlling manual records by applying terminology and procedures for indexing, coding, and filing alphabetically;

(B) identify and apply procedures for automated management of business records, at least including use of database management software for storage, retrieval, manipulation, selection, and reporting of records;

(C) identify business applications of electronic spreadsheets and understand and/or demonstrate fundamental concepts and operational procedures related to their use.

(3) Concepts and skills related to management of information flow out of, into, and within an office. The student shall be provided opportunities to:

(A) understand concepts related to computer-aided preparation and distribution of personalized correspondence, at least including use of mail merge and electronic mail;

(B) identify tools for preparing information for mass distribution, at least including desktop publishing, production of presentation graphics, and maintenance of electronic bulletin boards;

(C) understand the concepts of using communication systems both for accessing remotely stored information (at least including use of on-line information services) and for transmission of outgoing information; and

(D) understand concepts related to transporting of images electronically.

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(4) Identify characteristics of contemporary office systems related to information processing and management. The student shall be given opportunities to:

- (A) observe office activity related to information processing and information management;
- (B) discuss responsibilities and procedures involved in business information processing with individuals working in the field;
- (C) read and discuss current literature related to business information processing; and
- (D) identify emerging information processing tools and understand their impact on business information processing.

APPENDIX C

LIST OF PUBLISHERS

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Stillwater, OK 74074

V TECS - COMMISSION ON EDUCATION INSTITUTIONS
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605 Third Avenue
New York, NY 10158

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APPENDIX D

PROFESSIONAL ORGANIZATIONS

American Federation of Information
Processing Societies, Inc.
1815 North Lynn Street
Arlington, VA 22209

American Society for Information Science
1155 16th Street, N.W.
Washington, D.C. 20036
(202) 659-3644

American Society for Training and Development
P.O. Box 5307
Madison, WI 53705

Association for Computer Users (ACU)
1133 Avenue of the Americas
New York, NY 10036
(212) 265-6309

Association for Educational
Communications and Technology (AECT)
1126 16 Street, N.W.
Washington, D.C. 20036
(202) 833-4180

Association for Educational Data Systems
(AEDS)
1201 16th Street, N.W.
Washington, D.C. 20036
(202)833-4100

Association for the Development of
Computer-Based Instructional
Systems (ADCIS)
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CF Computer Center
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(206) 676-2860

Computer-Based Education Research
Laboratory
University of Illinois
Urbana, IL 61801

Computer-Using Educators
% W. Don McKell
Independence High School
1776 Educational Park Drive
San Jose, CA 95133

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and Research
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(800) 257-9406

Educational Technology Center
University of California
Irvine, CA 92717
(714) 833-6911

EDUCOM
P.O. Box 364
Princeton, NJ 08540
(609)734-1915

International Council for Computers
in Education (ICCE)
Department of Computer and
Information Science
University of Oregon
Eugene, OR 97403

Laboratory for Personal Computers in Education
State University of New York
Stony Brook, NY 11094
(516) 246-8418

MicroSOFT
Northwest Regional Educational Laboratory
500 Lindsay Building
710 2nd Avenue, S.W.
Portland, OR 91204
(503)248-6974

Microcomputer Center
San Mateo Educational Resources Center
Library
333 Main Street
Redwood City, CA 94063
(415) 363-5469

Microcomputer Education Applications Network
256 North Washington Street
Falls Church, VA 22046

Microcomputer Resource Center
Teachers College
Columbia University
New York, NY 10027
(212) 678-3740

Minnesota Educational Computing
Consortium (MECC)
2520 Broadway Drive
St. Paul, MN 55113
(612) 376-1101

National Association of Computer Stores
3255 South U.S.1
Fort Pierce, FL 33450
(305) 465-9450

National Education Association
1201 16th Street, N.W.
Washington, D.C. 20036

Texas Computer Education Association
7131 Midbury
Dallas, TX 75230
(214) 361-9472

APPENDIX E

PROFESSIONAL PUBLICATIONS

BUSINESS JOURNALS

Business Education Journal
Emporia State University
Division of Business and
Business Education
1200 Commercial St.
Emporia, KS 66801
The journal contains general business topics with emphasis on business production and teacher education.

Business Education World
Gregg Division
McGraw-Hill Book Company
1221 Avenue of the Americas
New York, NY 10020
Innovative application of teaching methodology, educational concepts, descriptions of new curricula and trends in business and office education subjects. Free to business teachers.

Business Educational Forum
National Business Education Assn.
1914 Association Drive
Reston, VA 22091
The journal features articles for teachers of secretarial programs, typewriting, accounting, clerical programs, basic business, as well as economics, marketing and distribution, communication, and data processing.

Business Horizons
Graduate School of Business
Indiana University
Bloomington, IN 47405
Articles by academics and business people on significant business issues, trends, and research projects.

Delta Pi Epsilon Journal
Delta Pi Epsilon National Office
Gustovus Adolphus College
St. Peter, MN 56082
Devoted to research articles dealing with theroy, practice, and research in business education.

Journal of Business Education
Heldref Publications
4000 Albemarle St. NW
Washington, DC 20016
A journal dealing with business education from high school to community college level. Contributors are principally teachers and academics.

VOCED
formerly American Vocational Journal
2020 N. 14th Street
Arlington, VA 22201
The journal of the American Vocational Association published for teachers, administrators, counselors, and laypersons involved in the task of preparing people for work. The journal gives a balanced view of both the theoretical and practical aspects of vocational education.

NEWSLETTERS

The Office Professional
1316 Sam Bass Circle
Round Rock, TX 78664
Provides reliable information about office systems and procedures, secretarial methods, management thinking, and office technology. Also features articles on communication techniques, professional human relation skills, and the latest approaches to career development.

Open Entries
The Center for Studies in
Vocational Education
Florida State University
Stone Building
Tallahassee, FL 32306
A nationwide communication link for educators involved in competency-based vocational education that encourages exchange of information on competency-based learning materials, development of new guides, packets, audiovisual materials and computer-based resources.

622

Texas Business Educator
Texas Business Educational Assn.
P.O. Box 15915
Austin, TX 78752
A semiannual bulletin of the activities of the Texas Business Education Association, plus articles of current interest to business educators.

Viewpoints in Business Education
Milady Publishing Corp.
3839 White Plains Road
Bronx, NY 10467
A teaching methods and materials newsletter for business education teachers.

The Balance Sheet
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229
The publication is free to teachers and features articles of current interest relating to business and economic course offerings at the high school and postsecondary levels.

Modern Office Procedures Magazines
Pent/IPC
1111 Chester Avenue
Cleveland, OH 44114
Business/office market magazine featuring office procedures and utilization of new technological developments in computers, business machines, furnishings, and supplies.

The Office
Office Publications, Inc.
1200 Summer Street
Stamford, CT 06904
The magazine discusses many aspects of office practice and management for both executives and office managers. Articles include topics such as systems analysis, programming, employee relations, applications of computers, and product/equipment announcements.

Office Guide
Bureau of Business Practices
24 Rope Ferry Road
Waterford, CT 06385-9985
Issued twice each month, the six-page publication offers office hints and shortcuts that can be used as a training tool to upgrade office personnel.

Office Guide for Working Women
Bureau of Business Practice
24 Rope Ferry Road
Waterford, CT 06385-9985
The magazine offers general articles and regular features on typing, vocabulary, and grammar applicable to office workers and/or secretarial science students.

Office Talks
Bureau of Business Practice
24 Rope Ferry Road
Waterford, CT 06385-9985
Featuring office techniques, personal appearance, office etiquette, cosmetics, and hygiene for secretaries.

P.S. for Professional Secretaries
Bureau of Business Practices
24 Rope Ferry Road
Waterford, CT 06385-9985
Helps office personnel to perform their tasks more quickly, easily, and efficiently.

The Secretary
Professional Secretaries Int.
301 East Armour Blvd.
Kansas City, MO 64111-1299
A publication for professional secretaries featuring articles by management, business educators, and secretaries that stresses improving knowledge and ability in secretarial expertise.

Today's Office
Hearst Business Communications
UTP Division
645 Stewart Avenue
Garden City, NY 11530
A professional business magazine covering the office.

APPENDIX F

SOFTWARE VENDORS

Abbot Educational Software
334 Westwood Avenue
East Longmeadow, MA 01028
(413) 525-3462

Academic Software
22 E. Quackenbush Avenue
Durmont, NJ 07628

Acorn Software Products
634 North Carolina Avenue, S.E.
Washington, D.C. 20003
(202) 544-4259

Addison-Wesley Publishing Co.
Business & Professional Division
Reading, MA 01867
(617) 944-3700

Advanced Systems, Inc.
2340 S. Arlingon Heights Rd.
Arlington Heights, IL 60005
(312) 981-4260

Ag-Com
P.O. Box 706
Muscatine, IA 52761
(319) 264-3267

Agri-Education, Inc.
815 Shakespeare
Stratford, IA 50249

Ag Plus Software
906 South Main
Ida Grove, IA 51445
(712) 364-2135

Agricultural Computer Applications
1217 Beech Lane
Davis, CA 95616
(916) 756-8946

Agri-Education, Inc.
815 Shakespeare
P.O. Box 66
Stratford, IA 50249
(515) 838-2785

Agri Soft
1001 E. Walnut
Columbia, MO 65201
(314) 443-4316

Agri-Ware
3426 East 242nd St.
Elko, MN 55020
(612) 461-3429
(507) 388-9290

Alternate Source
1806 Ada Street
Lansing, MI 48910
(517)487-3358

American Training International
3770 Highland Ave.
Suite 201 B
Manhattan Beach, CA 90266
(213)546-4725

Apple Computer Company
10260 Bandley Drive
Cupertino, CA 95014
(408) 996-1010

Applications
10260 W. Eleven Mile Road
Suite 103
Southfield, MI 48076

Applied Educational Systems
RFD #2, Box 213
Dunbarton, NH 03301
(603) 774-6151

Applied Microsystems
P.O. Box 832
Roswell, GA 30077

Applied Software Technology
14125 Capli Drive
Los Gatos, CA 95030

Aurora Sytems
2040 East Washington Avenue
Madison, WI 53704
(608) 249-5875

B&B Software
P.O. Box 2090
Ann Arbor, MI 48106
(313) 668-8152

Bell & Howell Micro Systems
Audio Visual Products Division
7100 North McCormick Road
Chicago, Il 60645
(312) 262-1600

Betamax, Inc.
101 Nickerson Street
Suite 550
Seattle, WA 98109
(206) 282-6249

Bits & Bytes
Fenner Block, 33 Church Street
Fredonia, NY 14063
(716) 673-1515

Borg-Warner Educational Systems
600 West University Drive
Arlington Heights, IL 60004
(800) 323-7577

Brinker Computing
2775 Tessmer Rd.
Ann Arbor, MI 48103
(313) 662-6386

Business and Agri Services
R.R. 2, Box 118
Raymond, IL 62560
(217) 229-3584

Comprehensive Software
2316 Artesia Blvd.
Suite B.
Redondo Beach, CA 90278
(213) 318-2561

Computation
P.O. Box 502
Troy, MI 48099

The Computer Center
302 Commercial
Waterloo, IA 50701
(319) 232-9504

Computerized Farm Information
Systems
Box 302
Stillwater, MN 55082
(612) 436-7198

Computer Information Exchange
P.O. Box 159
San Luis Rey, CA 92068
(714)757-4849

Computerland
2500- B South Columbia Road
Grand Forks, ND 55082
(612) 436-7198

Computrex Computer Services
P.O. Box 536
Inman, SC 29349

Computer House Division
1407 Clinton Road
Jackson, MI 49202
(517) 782-2132

Continental Software
12101 Jefferson Blvd.
Culver City, CA 90230
(213) 371-5612

Control Data Corp.
P.O. Box 261127
San Diego, CA 92126
(800) 233-3784

Cook's Computer Company
1905 Bailey Drive
Marshalltown, IA 50158

Courseware, Inc.
10075 Carroll Canyon Rd.
San Diego, CA 92131
(619) 578-1700

Creating Computing Software
Department 301
P.O. Box 789M
Morristown, NJ 07960
(201) 540-0445

Creative Software
230 E. Caribbean Dr.
Sunnyvale, CA 94089
(408) 745-1655

Curriculum Applications
P.O. Box 264
Arlington, MA 02174

Dallas Public Schools
Marketing Department
912 South Ervay
Dallas, TX 75201
(214)742-7991

Decision Data, Inc.
213 Lincoln Way
Ames, IA 50010
(515)233-4807

Dorsette Educational Systems, Inc.
P.O. Box 1226
Norman, OK 73070
(405) 288-2300

Educational Activities, Inc.
P.O. Box 392
Freeport, NY 11520
(516) 223-4666

Educational Courseware
Ten Bay Street
Design 66
Westport, CT 06880

Educational Microsystems, Inc.
P.O. Box 471
Chester, NJ 07930
(210) 879-5982

Educational Programming Systems
1328 Baus Boulevard
St. Louis, MO 63132
(314) 991-0300

Educational Programs
P.O. Box 2345
West Lafayette, IN 47906
(317) 463-4778

Educational Services Management
P.O. Box 12599
Research Triangle Park, NC 27709
(919) 781-1500

Educational Software Corp.
414 Rosemere
Maquoketa, IA 52060

Educational Software and Design
P.O. Box 2801
Flagstaff, AZ 86003

EduTech
50 Putnam Street
West Newton, MA 02165
(617) 965-4813

Edutek Corp.
P.O. Box 11354
Palo Alto, CA 94306
(415) 325-9965

Educational Testing Services
SIGI Office
Princeton, NJ 08541
(609) 734-5165

Edu-Ware
P.O. Box 336
Maynard, MA 01754

Edu-Ware Services, Inc.
22222 Sherman Way
Suite 102
Canoga Park, CA 91303
(213) 346-6783

EMC Publishing
Changing Times Education Services
300 York Avenue
St. Paul, MN 55101

Great Plains Computers
113 Broadway
Fargo, ND 58102
(701) 293-8483

Harris Laboratories
624 Peach St., P.O. Box 8037
Lincoln, NE 68501
(402)476-2811

Hartley Courseware, Inc.
P.O. Box 431
Diamondale, MI 48821
(616) 942-8987

Harvest Computer Systems
203 West 11th Street
Alexandria, IN 46001
(317) 724-9527

Hayden Book Company
50 Essex Street
Rochelle Park, NJ 07662
(800) 631-0856

High Technology Software Products, Inc.
P.O. Box 14665
Oklahoma City, OK 73113
(405) 840-9900

Horizons Unlimited
5367 Sage
Edwards, CA 93523
(805) 258-8412

Houghton Mifflin Company
One Beacon Street
Boston, MA 02107
(617) 725-5000

Individual Software, Inc.
1163-1 Chess Dr.
Foster City, CA 94404
(415) 341-6116

Innovative Programming Associates
One Airport Place
Princeton, NJ 08540
(609) 924-7272

Instructional Development Systems
2927 Virginia Beach, VA 23452
(804) 340-1977

Instructional Software, Inc.
1278 Massachusetts Ave.
Cambridge, MA 02138
(617) 492-0386

International Bureau of
Software Testing
536 Wendell, Suite 7
Sunnyvale, CA 94086

International Micro Systems
8425 Quivara Road
Lenexa, KS 66215
(913) 888-8330

Interpretive Education
2306 Winters Drive
Kalamazoo, MI 49002
(616) 345-8681

Interpretive Education Incorporated
157 S. Kalamazoo Mall
Suite 250
Kalamazoo, MI 49007
(616) 345-8681

Knoware, Inc.
301 Vassar Street
Cambridge, MA 02139
(617) 576-3821

Krell Software
21 Millbrook Drive
Stony Brook, NY 11790
(518)751-5139

Lawrence Hall of Science
Math/Computer Education Project
University of California
Berkeley, CA 94720

Learning Arts
P.O. Box 179
Wichita, KS 67201
(316) 682-6594

Library Software
P.O. Box 23897
Pleasant Hill, CA 94523

Charles Mann & Associates
Microcomputer Division
55722 Santa Fe Trail
Yucca Valley, CA 92284
(714) 365-9718

McGraw-Hill Book Company
School Division
1221 Avenue of the Americas
New York, NY 10020
(800) 223-4180
(Profit and Loss)

Micro-Comp Incorporated
2015 N.W. Circle Blvd.
Corvallis, OR 97330

Microcomputer Education
Applications Network
256 N. Washington Street
Falls Church, VA 22046
(702) 536-2310

Microcomputers in Education
4148 Winnetka Avenue, North
Minneapolis, MN 55427
(612) 533-2781

Microcomputer Software
Illinois Vocational Curriculum Center
Sangamon State University, E-22
Springfield, IL 62708
(217) 786-6375

Microcomputer Software Systems
4716 Lakewood Drive
Metairie, LA 70002

MICRO-ED, Inc.
P.O. Box 24156
Minneapolis, MN 55424
(612) 926-2292

Micro Lab Learning Center
3218 Skokie Valley Road
Highland Park, IL 60035
(312) 433-7550

Micro Learningware
P.O. Box 2134
North Mankato, MN 56001
(507) 625-2205

Micropute Software
P.O. Box 1943
Rock Mount, NC 27801

Microsoft Consumer Products
400 180th Avenue, N.E.
Bellevere, WA 98004
(206) 454-1313

Milliken Publishing Company
1100 Research Boulevard
St. Louis, MO 63132
(314) 991-4220

Minnesota Curriculum Services Center
3554 White Bear Avenue
White Bear Lake, NM 55110
(612)770-3943

Minnesota Educational Computing
Consortium Publications
2520 Broadway Drive
St. Paul, MN 55113
(800) 631-8112

Muse Software
347 N. Charles St.
Baltimore, MD 21201
(301) 659-7212

NCCD (National Coordinating Center
for Curriculum Development)
State University of New York
Stony Brook, NY 11794
(516) 246-8418

National Software Marketing
4701 McKinley Street
Hollywood, FL 33021
(305) 625-6062

On-Line Systems
36575 Mudge Ranch Road
Coarsegold, CA 93614
(202) 683-6858

Photocom Productions
P.O. Box 3135
Pismo Beach, CA 93449
(800) 321-7367

Pillsbury Center
Mail Center 3286
200 S. 6th Street
Minneapolis, MN 55402
(612) 330-8732

Precision People, Inc.
P.O. Box 17402
Jacksonville, FL 32216
(904) 642-1980

Programs for Learning, Inc.
P.O. Box 954
New Millford, CT 06776

Quality Educational Designs
P.O. Box 12486
Portland, OR 97212
(503) 282-4906

Rainbow Micro Software
1650 Piikea Street
Honolulu, HI 96818
(TRS-80 Programs)

Reston Publishing
11480 Sunset Hills Rd.
Reston, VA 22190
(703) 437-8900

Scholastic, Inc.
904 Sylvan Ave.
Englewood Cliffs, NJ 07632

School Microware
P.O. Box 246
Dresden, ME 04342
(207) 737-4466

Social Science Software
17408 N.E. 19th Place
Bellevere, WA 98008
(206) 747-0948

The Software Exchange
6 South Street, Box 68
Milford, NH 03055
(603) 673-5144

Software Industries
902 Pinecrest
Richardson, TX 75080

South Western Publishing Company
5101 Madison Rd.
Cincinnati, OH 45227
(513) 271-8811

Sterling Swift Publishing Company
7901 South IH-35
Austin, TX 78744
(512) 282-6840

Stoneware
Microcomputer Products
50 Belvedere Street
San Rafael, CA 94901
(415) 454-6500

Strictly Software
4321 N. 39th Street
Phoenix, AZ 85018
(602) 955-8138

The Teaching Assistant
22 Seward Drive
Huntington Station, NY 11746

Teaching Tools
P.O. Box 12679
Research Triangle Park, NC 27709
(919) 851-2374

3R Software
P.O. Box 3115
Jamaica, NY 11431

Teacher's Pet
c/o Glenn Fisher
1517 Holly Street
Berkeley, CA 94703

Time Share Corp.
Hanover, NH 03775
(603) 488-3838

TYC Software
40 Stuyvesant Manor
Geneseo, NY 14454
(716) 243-3005

Visicorp
2895 Zanker Rd.
San Jose, CA 95134
(408) 946-9000

Vocational Agriculture Service
College of Agriculture
University of Illinois
1401 S. Maryland Drive
Urbana, IL 61801
(217) 333-3873

Westinghouse Learning Corp.
5505 West 110th Street
Oak Lawn, IL 60453

Whitney Educational Services
2071 Tenth Avenue
San Francisco, CA 94116

APPENDIX G

MICROCOMPUTER DIRECTORIES

APPLE COMPUTER EDUCATION SOFTWARE DIRECTORY
Visual Materials, Inc.
4170 Grove Avenue
Gurnee, IL 60031 $9.95
Describes nearly 1100 software packages in 19 subject categories from elementary through college level. Also includes administrative, office, and utility applications packages.

APPLE II/III SOFTWARE DIRECTORY
Vital Information, Inc.
7899 Mastin Drive
Overland Park, KS 66204 $19.95
Program descriptions of Apple software for home, business, and education. Also includes a vendor list and list of Apple user groups.

THE APPLE SOFTWARE DIRECTORY
WIDL Video
5245 W. Diversey Ave.
Chicago, IL 60639
(312) 622-9606 $9.95
Educational software from 400 vendors by subject matter.

THE BOOK OF APPLE SOFTWARE
The Book Company
11223 So. Hindry Ave.
Los Angeles, CA 90045
(213) 417-8031
or available from
ADDISON-WESLEY PUBLISHING COMPANY
Reading, MA 01867 $19.95 per volume
Approximately 125 educational programs reviewed by paragraph descriptions and numerical ratings. Field test results are also available.

THE COMMODORE SOFTWARE ENCYCLOPEDIA
Commodore Corporate Offices
Educational Department
487 Devon Park Drive
Wayne, PA 19087
(continued)
(215) 687-9750 $9.95
Available at local Commodore dealers or from software publishers. Special education section lists approximately 740 programs from various software publishers. Only Commodore-approved software listed.

EDUCATIONAL SOFTWARE DIRECTORY
Sterling Swift Publishing Co.
1600 Fortview Road
Austin, TX 78704
Apple software only.

EDUCATORS HANDBOOK AND SOFTWARE DIRECTORY
Vital Information, Inc.
7899 Mastin Drive
Overland Park, KS 66024 $19.95
Contains 1500 program descriptions in 12 major subject categories indexed by title, subject, grade level, and publisher. Also includes articles, a guide to obtaining funding and grants, a list of user groups, and more.

GAMCO MICROCOMPUTER SOFTWARE
Box 310 P
Big Spring, TX 79720-0120
(915) 267-6327 Free
Contains lists and descriptions by microcomputer and subject area. For Apple, PET, TRS-80.

INTERNATIONAL MICROCOMPUTER SOFTWARE DIRECTORY
Imprint Software
420 So. Howest St.
Ft. Collins, CO 80521
(800) 525-5992 $29.95
Lists, cross-references over 5000 programs.

PC WORLD
555 DeHaro Street
San Francisco, CA 94107 $24.00
Comprehensive list of products available for the IBM-PC or IBM-PC compatible computers.

REFERENCE MANUAL FOR
INSTRUCTIONAL USE OF
MICROCOMPUTERS
Jem Research
Discovery Park
University of Victoria
P.O. Box 100
Victoria, BC V8W 2Y2, Canada
(604) 477-7246 $75.00
Cross references over 1000 educational software programs; some programs are evaluated.

THE SOFTWARE DIRECTORY
Software Central
P.O. Box 30424
Lincoln, NE 68503
Includes a special section of educational software; programs are briefly described.

APPENDIX H

PROMOTIONAL AND STUDENT RECRUITMENT CALENDAR

AUGUST–SEPTEMBER

1. Finalize recruitment plans with school administrators and counselors.
2. Prepare fact sheets and research data on careers in business and give them out to administrators and faculty.
3. Construct bulletin board displays in front of school office and in hallways.
4. Develop brochures to be available for students and parents in the counselor's office.
5. Prepare news releases and mail them to community media sources.
6. Develop and conduct an occupational interest survey and compile a mailing list for the survey.
7. Revise program information for student handbooks and curriculum guides.
8. Develop and implement radio commercials.
9. Make presentations to civic and business organizations in the community.

OCTOBER–DECEMBER

1. Reconstruct bulletin board and classroom displays.
2. Continue community and school publicity through news media and other promotions.
3. Develop videotapes aimed towards students and parents.
4. Participate in school-wide career day.
5. Have students develop posters promoting office education.
6. Prepare personal letters, brochures, and other materials for students who express an interest in office education and for those with high clerical and business scores on standardized occupational interest tests.
7. Meet with counselors again to explain thoroughly the office education course offerings.

JANUARY

1. Mail recruitment letters to students and parents.
2. Visit counselors again to be sure they understand and support programs.
3. Analyze records of students, searching for students with previous business education and related skills courses. Seek out these students or send them letters inviting them to tour the office education classroom.
4. Have students give recruiting presentation in homerooms and assemblies.
5. Continue community and school-based publicity.
6. Begin intense recruitment with creative PA announcements, posters, bulletin board displays, and other promotional ideas.
7. Show videotapes in school cafeteria during lunch periods.
8. Use the expertise of advisory committee members in all promotions.

FEBRUARY–MARCH

1. Conduct personal interviews with students and parents who want more information.
2. Continue community and school public relations and publicity.
3. Participate in Vocational Education Week activities.
4. Conduct an open house for advisory committee, business community leaders, employers, counselors, teachers and news media.

APRIL–MAY

1. Send appreciation letters to students, parents, administrators, counselors, and employers.
2. Sponsor student-employers-parent appreciation event.
3. Publicize all awards, new job placements, success stories, and scholarships received by students.
4. Continue to coordinate recruitment through the counselors and teachers.

APPENDIX I

INFORMATION PROCESSING COMPETENCY PROFILE

ENTRY LEVEL INFORMATION PROCESSING OPERATOR DACUM CHART

	DUTIES	TASKS						
A.	LEARN EQUIPMENT AND COMPANY STANDARDS Reference and In-House Manuals	RECEIVE ONGOING RESOURCE INFORMATION AND INSTRUCTION A1	WORK THROUGH HANDS ON TUTORIAL A2	TYPE PRACTICE AND/OR REAL DOCUMENTS A3				
B.	HANDLE MEDIA Diskettes, Reel and Cassette Tape, Packs, Paper, Microfilm, Laser Cards/Disks	LABEL MEDIA B1	RETRIEVE MEDIA B2	FILE MEDIA B3	STORE MEDIA B4			
C.	TYPE DOCUMENTS	START SYSTEM/SIGN ON C1	RECEIVE ASSIGNMENT WITH INSTRUCTIONS C2	KEY IN THE MATERIAL C3	PROOFREAD DOCUMENT C4	FINALIZE THE DOCUMENT C5		
D.	TRANSCRIBE ORAL/WRITTEN DATA	TURN ON MACHINE(s) D1	SIGN ON TO THE SYSTEM D2	RECEIVE ASSIGNMENT WITH INSTRUCTIONS D3	PREPARE FOR TRANSCRIPTION D4	KEY IN THE MATERIAL D5	PROOFREAD DOCUMENT D6	FINALIZE THE DOCUMENT D7
E.	CREATE ROUTINE DOCUMENTS	START SYSTEM/SIGN ON E1	RECEIVE ASSIGNMENT WITH INSTRUCTION E2	GATHER NEEDED DATA E3	COMPOSE AND KEY IN DOCUMENT E4	PROOFREAD DOCUMENT E5	FINALIZE THE DOCUMENT E6	
F.	REVISE DOCUMENTS	START SYSTEM/SIGN ON F1	RECEIVE ASSIGNMENT WITH INSTRUCTION F2	LOCATE DOCUMENT ON SYSTEM F3	INTERPRET CHANGES AND REVISE ACCORDINGLY F4	PROOFREAD DOCUMENT F5	FINALIZE THE DOCUMENT F6	
G.	FILL IN FORMS Boiler Plates, I.R.S., and Standard and Business Forms	START SYSTEM/SIGN ON G1	RECEIVE ASSIGNMENT WITH INSTRUCTION G2	LOCATE DOCUMENT ON SYSTEM G3	DUPLICATE FORM AND FORMAT AND INSERT INFORMATION G4	PROOFREAD DOCUMENT G5	FINALIZE THE DOCUMENT G6	
H.	PROOFREAD HARD COPY Proofread 1. Check Spelling 2. Look for Widows and Orphans 3. Check Standard Format 4. Check Special Format 5. Check Page Numbers 6. Check Footnotes 7. Check Outline Numbers 8. Check Quote Marks 9. Check for Revisions 10. Grammar 11. Punctuation 12. Make Suggestion as to Changes 13. Check Print Quality 14. Visually Correct	RECEIVE ASSIGNMENT WITH INSTRUCTION H1	READ AGAINST ORIGINAL COPY FOR ACCURACY AND/OR PROPER FORMAT H2	REVISE AS NEEDED H3				
I	KEEP RECORDS	ACCOUNT FOR PRODUCTION TIME I1	ACCOUNT FOR OUTPUT (Projects, Page Count) I2	ACCOUNT FOR CHARGES I3				

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BEST COPY AVAILABLE

ENTRY LEVEL INFORMATION PROCESSING OPERATOR

JOB DESCRIPTION: Entry Level Information Processing Operator uses information processing systems to type, edit, format and create and print routine correspondence, standard reports and other documents under the direction or supervision of a trainer or experienced operator. Responsible for routine transcription and manipulation of text from various types of source information. Maintains production records and proofreads own work.

EQUIPMENT

HARDWARE:

- MAIN FRAMES AND TERMINALS
- PERSONAL COMPUTERS
- STAND ALONE - DEDICATED W/P
- PRINTERS
- TELEX
- SCANNERS
- TELEPHONES (PLAIN AND FANCY)
- FAX MACHINE
- MODEMS
- MICE
- STORAGE SYSTEMS
- ARCHIVERS
- TRANSCRIBER MACHINES
- COPIERS

SOFTWARE:

- WORD PROCESSOR
- ACCOUNTING
- SPREAD SHEETS
- DATA BASE
- COMMUNICATIONS
- RECORD KEEPING
- GRAPHICS
- DESK TOP PACKAGING
- INTEGRATED PACKAGES
- UTILITIES
- DOS
- NETWORK
- CUSTOM
- TUTORIAL
- DEMONSTRATION

STEPS FOR FINALIZING A DOCUMENT

1. MAKE NEEDED CORRECTIONS
2. PROOF AGAIN
3. EXIT DOCUMENT
4. STORE AND OR PRINT
5. SUBMIT FOR FURTHER PROCESSING
6. ACCOUNT FOR TIME AND CHANGES (SCREEN/PAPER)

CHARACTERISTICS

- ENTHUSIASTIC
- POSITIVE
- INITIATIVE
- PEOPLE ORIENTED
- LOGICALLY MINDED
- TEAM PLAYER
- S. OF H.
- ENERGETIC
- EAGER
- DEPENDABLE
- WILLING/ABLE TO FOLLOW INSTRUCTIONS
- ABLE TO WORK UNDER PRESSURE
- PERFECTIONIST

KNOWLEDGE AND SKILLS

- INTELLIGENT
- PROFESSIONAL APPEARANCE
- COMMUNICATION
- GOOD COMMAND OF ENGLISH LANGUAGE
- TERMINOLOGY
  - BUSINESS
  - WORD/INFORMATION PROCESSING
- TACT
- INTERVIEW SKILLS
- COMPUTER LITERACY

APPENDIX J

SUGGESTED CAREERS IN INFORMATION SYSTEMS

This curriculum should provide the essential foundation for progress or entry into an Information Systems career path. Below is a selective list of titles which illustrate the variety of positions currently being filled at various levels of organizations in Information Systems. Research has shown that many of these positions have been newly created within the last two to three years:

Administrative Assistant
Administrative Secretary
Administrative Services Coordinator
Administrative Services Specialist
Administrative Services Assistant Vice President
Administrative Systems Coordinator
Data/Word Processing Coordinator
Executive Secretary/Assistant
Information Center Director
Information Center Manager
Information Center Specialist
Information Processing Supervisor
Information Processing Systems Manager
Information Systems Director
Information Systems Manager
Information Systems Supervisor
Information Systems Trainer/Coordinator
Marketing Support Representative
Office Automation Analyst
Office Automation Coordinator
Office Automation Manager/Supervisor
Office Automation Specialist
Office Automation Supervisor
Office Manager
Office Services Manager
Office Services Supervisor
Office Systems Analyst
Office Systems Manager/Supervisor
Office Systems Specialist
Secretarial Services Supervisor
Senior Executive Secretary
Senior Office Systems Analyst
Senior Software Specialist
Senior Word Processing Technician
Software Specialist
Systems Administrator
Systems Analyst/Senior Systems Analyst
Systems Manager
Systems Trainer
Voice Communications Analyst
Word Processing Administrator/Coordinator
Word Processing Operator/Lead Worker
Word Processing Specialist
Word Processing Supervisor
Word Processing Center Manager/Supervisor

APPENDIX K

SUGGESTED MINIMUM EQUIPMENT LIST

1. At least one personal computer for every two students
2. One printer for every two computers
3. Eight transcribing machines
4. Eight electronic calculators
5. Ten electronic typewriters
6. At least one modem
7. One copy machine
8. Projector for computer image transfer

APPENDIX L

CODE OF ETHICS FOR VOCATIONAL EDUCATORS

WITH RESPECT TO SELF

The Vocational educator:

- Represents personal and professional qualifications in a true and accurate manner.
- Maintains confidentiality of students and colleagues except where disclosure is compelled by law or to serve a compelling professional need.
- Bases professional action and decisions upon sound, objective rationale without influence of favors, gifts, or personal or political advantage.
- Recognizes and accepts responsibility for individual actions, judgments, and decisions.
- Strives throughout one's career to master, maintain and improve professional competence through study, work, travel, and exploration.
- Strives for the advancement of vocational education, upholds its honor and dignity, and works to strengthen it in the community, state and nation.
- Participates actively in the work of professional organizations to define and improve standards of vocational education preparation and service.
- Establishes and maintains conditions of employment conducive to providing high quality vocational education.
- Performs one's duty as a teacher on the basis of careful preparation so instruction is accurate, current, objective and scholarly, designed to enhance the student's individual capabilities.
- Exercises professional judgment in presenting, interpreting and critiquing ideas, including controversial issues.
- Joins with other professionals whose mission is to improve the delivery of vocational education to the nation's citizens.

WITH RESPECT TO OTHERS

- Uses individual competence as a principal criterion in accepting delegated responsibilities and assigning duties to others.
- Provides statement about a colleague or student in a fair, objective manner without embarrassment or ridicule.
- Provides educational and/or career options to all students or colleagues.

- * Evaluates students and colleagues without regard to race, color, creed, sex, status, or any other factor unrelated to need for vocational education.
    - a. Allows any student or colleague to participate in the program who can benefit from the program.
    - b. Provide the same benefits or advantages to all students or colleagues in the program.
- * Respects the rights and reputation of the student, colleague with whom one works, and the institution or organization with which one is affiliated.
- * Acts to safeguard the health and safety of students and colleagues against incompetent, unethical or illegal behavior of any person, whether student or colleague.
- * Protects vocational education by promoting admission to the profession of persons who are fully qualified because of character, education, and experience, according to legally established criteria and standards.
- * Promotes improvement of legalities affecting vocational education.
- * Exercises professional judgment in the choice of teaching methods and materials appropriate to the needs and interests of each student.
- * Influences effectively the formation of policies and procedures which affect one's professional work.

Approved by the Board of the American Vocational Association.

APPENDIX M

ACKNOWLEDGEMENT

The module 7 Overview of the Vocational Special Needs Teachers Training Curriculum has been reprinted with permission as this appendix. Teachers are encouraged to refer to the original publication to learn more about working with special needs populations. The character font size and line spacing have been changed in this appendix to save space.

The project was developed in 1987 by Craig R. Colby, Ed.D. of Texas A&M University. Linda H. Parrish, Ph.D., Texas A&M University, and Jerry L. Wircenski, Ph.D., North Texas State University, were the project directors.

The vocational special needs teacher training curriculum was developed pursuant to a contract with the Texas Education Agency's Vocational Education Special Projects. Contractors or grantees undertaking such projects under Agency sponsorship are encouraged to freely express their professional judgement in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Texas Education Agency position or policy.

This information is presented as an appendix to help Office Education teachers with planning the modification of instruction for special populations. Many of the concepts and ideas presented are sound practices to be used with normal populations.

The entire 10 module training curriculum is available through the Extension, Instruction and Materials Center, University of Texas at Austin, P.O. Box 7218, Austin, Texas 78713-7218.

Some examples have been modified to meet the needs of Office Education programs.

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CURRICULUM MODIFICATION

The term "vocational curriculum" can be defined as the organized content of a particular discipline which a student must master to attain an occupational goal. It involves the sum total of all experiences and learning activities encountered in the classroom. A curriculum is concerned with results. It encompasses "what is to be taught" and "what is to be learned" (Stern-Otazo, 1980; Goh & Sitlington, 1983).

As discussed in previous modules, each student has a mental capacity, physical skills, and various needs which vary from one individual to the other. In addition, students exhibit different learning styles. All good teachers recognize this and will work toward developing a classroom environment which is characterized by a deep respect for the learner, acceptance of student, fulfillment of individual needs, and individual development. This is what is meant by the teacher who has become "learner-centered" and not "content-centered" (Pine & Boy, 1977). Jones (1977) eloquently describes recognizing individual worth and individual development as being the basis for curriculum development as follows:

> **Individual development** as a basis for curriculum perspective would lead us to teach discovery of principles and sacredness of the individual personality. It would teach the learners to view themselves as self-actualizing individuals in a setting designed to support and encourage personal development to the ultimate of one's potential. Attempts to improve the local community would center around providing a richer and fuller life for personal growth and development. Good people make good communities, good states, good nations, and good world. By emphasizing development of individuals, such a curriculum would hope to plant the seed for a better world in the future.

Therefore, all learners should be perceived as a very "special" individuals who one day will take their place in society. It is the responsibility of educators to assist **all** learners (in spite of their shortcomings) to become productive members of society. This can be accomplished by helping each student establish attainable career goals and then providing meaningful experiences through which the student can achieve these goals. Every student should be treated with dignity, as an individual who has unique strengths and interests in life. It is not necessary or even realistic to expect every student to do and know all the same things. As stated by Jones (1977), "Learners should become worthwhile persons in their own right,...it is not necessary that they all become miniature images of the same pattern."

Purpose of Curriculum Modification

When working with students with special needs, a learner's curriculum may need to be modified or adjusted to take into account major differences which could be found among these individuals. The term "curriculum modification" can be defined as tailoring an existing curriculum to the unique needs of students as they pursue an occupational goal (Sarkees & Scott, 1985; Goh & Sitlington, 1983). However, it should be strongly emphasized that modifying a curriculum does not mean that an educator should lower or alter the standards of his or her program. What it does mean is that the Admission Review and Dismissal (ARD) Committee (for handicapped students) or coordinated planning team (for disadvantaged and LEP students) determines which essential elements in the regular school curriculum would be appropriate for a student's needs. The State Board Of Education Rules For Curriculum offers the following key points (Texas Education Agency, 1985):

1. For students with special needs, school districts shall provide modifications in methodologies, pacing, and materials to ensure that instruction is delivered, as appropriate, in the essential elements.

2. Students with special needs shall be instructed in those same essential elements in a manner appropriate to their needs.

3. School districts shall implement the provisions (under Chapter 75) in a manner which will enable all students to participate actively in a well-balanced curriculum and master, to the best of their abilities, the knowledge, skills, and competencies established through the essential elements.

4. Specialized personnel and regular program personnel shall be jointly responsible for the cooperative delivery of effective instruction in the essential elements, as appropriate.

It is important to re-emphasize that special needs students, as all students, have capabilities which widely vary. The challenge parents, educators, and vocational counselors face is to help each learner reach occupational goals which are within the student's potential.

The Curriculum Modification Process

In developing a meaningful and challenging vocational curriculum for a special needs learner, the ARD Committee or coordinated planning team should carefully review the student's vocational assessment information which consists of: (a) the student's capabilities, (b) parent and student interviews (including the career expectations of the learner), (c) the student's vocational interests and abilities, and (d) the teacher's informal behavioral assessments of the student.

After reviewing this information, the planning team can then work toward developing realistic and appropriate vocational goals for the student. Important items to consider when developing vocational goals include: (a) community employment needs, (b) vocational readiness skills, (c) multiple exit points (jobs that a learner can prepare for in the vocational program), and (d) entry-level competencies expected by employers for each of the exit points. In this way, the learner would be aware of realistic employment opportunities, specific skills needed for entry into a vocational program, and specific objectives which must be fulfilled in reaching an employment goal.

A number of special education curriculum models have been designed which take into account both the needs of a vocational program and the needs of the learner. The basic components which many of the designs have in common are as follows:

1. The importance of working with existing vocational curricula.

2. The importance of building upon the student's interests and competencies.

3. The identification of long range vocational goals and short range objectives--which are stated in measurable terms.

For the purpose of this overview, the competency-based curriculum modification model has been selected for discussion.

The Competency-Based Curriculum

Over the years, the concept of competency-based curriculum has increased in popularity largely due to the emphasis on *accountability* in education (Choate, et al., 1987). In addition, since the passage of P.L. 94-142, vocational educators have had to adjust their curricula to take into account the capabilities of special needs learners.

The underlaying principle behind the competency-based curriculum is to assist the student in becoming a more effective person. This entails helping the student develop skills or competencies which will promote employment opportunities and a higher self-esteem within the student (Brolin, 1976; Lippmann & Porter, 1976). The ability to succeed is what makes competency-based learning so valuable for students with special needs (Kok, 1978). With competency-based learning a student does not have to wait until the end of the program to experience success. The sequential steps called for throughout the program afford the possibility of success on a day-to-day basis (Lippmann & Porter, 1976).

The concept of competency-based learning is relatively simple. Based upon the learner's assessment information, the educator establishes specific goals (competencies) which will help the student "function adequately as a consumer, a producer, a learner, and a citizen" (Parnell, 1973). For example, in an auto mechanics class, the student's occupational program goals or competencies may include one or more of the following: (a) performing a simple lubrication, (b) repairing a tire, (c) changing the battery, (d) completing an engine tune-up, (e) completing a valve job, (f) fixing the carburetor, or (g) overhauling the engine. Next, the educator develops objectives and an individualized instructional plan for the student to follow. This individualized instructional plan includes: (a) an objective, (b) an introduction, (c) a learning activity, (d) a test/checklist, and (e) answers/feedbacks.

Therefore, in competency-based learning it is not necessary or even realistic for the instructor to expose every learner to *all* the aspects of a vocational program. Competency-based learning focuses on the *quality* of learning rather than the quantity of learning such that the student who has limited skills could still find employment (Kok, 1978).

Gills's Four-Step Model

An excellent competency-based paradigm or model which can be utilized by vocational educators to maximize a learner's vocational potential was developed by Douglas H. Gill (Sarkees & Scott, 1982). The design of Gill's model involves the use of four sequential steps and utilizes the regular vocational curriculum as a basis for the modification process.

Step one. The first step in Gill's model requires the educator to gain a clear picture of the existing curriculum *any* student would follow in a particular vocational program. Gill calls this step "Establishing the Curriculum Framework." The purpose of this step is to organize the existing curriculum in such a way that it can be modified. This step involves: (a) identifying the overall long range goals of the vocational program, (b) identifying and listing the short-term objectives that sequentially comprise each long-range goal, and (c) identifying the instructional units which comprise a sequence for attaining each short-term objective. An example of a curriculum framework which outlines an overall long range goal, short-term objective, and instructional units follows:

1. **Long range goal**: Given appropriate tools, equipment and materials, the student will be able to demonstrate instructor specified job entry level skills in office occupations at a comparable rate of time and accuracy to that found on the job.
2. **Short term objective**: The student will be able to demonstrate the basic skills of data entry.
3. **Instructional units**: Word Processing. Using Data Base. Using Spreadsheets.

Once the long range goals, short term objectives, and instructional units have been outlined for a particular vocational program, the educator can begin the work of modification for a special needs learner.

Step two. Step two of Gill's four-step model, "Developing an Instructional Task Analysis," builds upon step one. The instructional task analysis lists the tasks that, when sequenced, make up the instructional unit. In this step the educator identifies the required tasks the student must perform, emphasizing what the student must do rather than what the student must read or write. An example of instructional tasks for one of the instructional units above follows:

1. **Instructional unit**: Word Processing
2. **Instructional tasks**: Operates standard keyboards
    - Gains access to system
    - Terminates operations
    - Operates keyboard functions keys
    - Operates visual display stations
    - Operates optical character recognition equipment (OCR)
    - Develops user-defined program sequences
    - Implements program sequence
    - Uses new hardware and software features
    - Operates storage function controls
    - Uses floppy disks to store, retrieve and/or duplicate information
    - Uses fixed disk to store, retrieve and/or duplicate information
    - Uses magnetic tapes to store, retrieve and/or duplicate information
    - Initializes disks
    - Deletes information from storage
    - Handles and stores media
    - Operates output device function controls
    - Operates paper handling devices
    - Uses impact printers
    - Uses laser printers
    - Uses telecommunication features
    - Performs operator maintenance
    - Determines sources of malfunctions
    - Corrects or reports malfunctions

Therefore, establishing the curriculum framework and required instructional tasks (task analysis) organizes the instructional process and prepares for the next step in the process.

Step three. The third step in Gill's four-step model represents the implementation stage. This step, "Developing the Curriculum Supplement," involves developing usable supplements for the existing curriculum. The curriculum supplement is designed to be used jointly by the instructor and the resource support person. The curriculum supplement is composed of two major parts: (a) the Learning Plan and (b) the Supplemental Learning Plan.

The Learning Plan is used primarily by the instructor and consists of the following four basic parts:

1. Instructional unit
2. Instructional task
3. Performance-based task activities
4. Performance-based task check

The instructional unit and instructional task are components of the curriculum framework. The performance-based task activities describe for the instructor those task elements the student will do. The performance-based task check is a measurement of the student's ability to master the task at hand.

The Supplemental Learning Plan was developed for use primarily by special needs support personnel and consists of the following six basic parts:

1. Instructional unit
2. Instructional task
3. Task terminology
4. Essential math operations
5. Coordinated movements
6. Related concepts

The purpose of the Supplemental Learning Plan is to identify basic knowledge (task terminology, essential math operations, important concepts) and prerequisite skills (coordinated movements, related concepts) the learner must posses in order to complete an instructional task. The Supplemental Learning Plan can be very useful in helping the resource teacher and instructor identify those areas where instruction support may be needed. It is, therefore, very important that the Learning Plan and Supplemental Learning Plan be developed by the instructor, special education teacher, or support/resource teacher for each instructional task. In this way, if a learner has difficulty mastering a specific task, individualized activities can be developed by selected individuals to help the student resolve the problem.

Step four. The fourth and final step of Gill's model is the development of an individualized student module. The student's module is created from the Learning Plan and Supplemental Learning Plan and is the culmination of the curriculum modification process. The student's module consists of the following four components (Goh & Sitlington, 1983):

1. **Word section:** Includes terms identified on the supplemental learning plan, along with definitions of each term.
2. **Job tasks:** Definition of each step in the job. This appears in the student module under the heading "What You Do."
3. **Illustrations of job tasks:** The illustrations help clarify the job steps and should be clear and precise, without being complex.
4. **Evaluation procedures:** Both enroute (formative) checkups and a final (summative) performance check are included to assess the learner's progress through the module.

The student's module is tailored to help meet the specific needs of a learner and serves as a guide to assist the student in achieving instructional tasks. Various ways in which a student's module can be individualized to take into account the various learner differences found in the training setting are as follows (Goh & Sitlington, 1983):

1. The amount of detail and illustrations can be varied to take into account learner differences in intellectual abilities and educational backgrounds.
2. The mode of presentation can be altered to meet the needs of learners with differences in learning styles (e.g. audio-cassettes can be added for auditory learners).
3. The amount of feedback from the module and instructor can be increased or decreased to match differences in motivation, perseverance, and tolerance levels.

In summary, Gill's four-step model is a competency-based process flowing directly from the regular vocational curriculum. The steps range from establishing a curriculum framework to developing an individualized student module. Gill's model is not designed to replace or lower the standards of the regular vocational curriculum. It is a systematic process by which a special needs student can achieve solid vocational goals through the cooperative support of vocational instructors, special educators, and support personnel.

Responsibilities of the Vocational Educator

The primary responsibility of the vocational educator in the curriculum modification process is to help the special needs student establish and reach realistic occupational goals. In an effort to accomplish this, the vocational educator must identify the following (Sarkees & Scott, 1985):

1. Pertinent information about what will be taught in a vocational program.
2. Necessary requirements for program completion.
3. Multiple exit points (jobs that the learner can prepare for in a vocational program).

4. Entry level competencies expected by employers for each of the exit points.

It is also the responsibility of every vocational educator to establish an effective and wholesome learning environment for their students. Providing this environment may involve modifying the vocational facility, equipment, tools and/or instruction. This information will be provided in the following section.

MODIFICATION OF THE LEARNING ENVIRONMENT

The term "learning environment" refers to both the physical and instructional setting of the vocational classroom/laboratory (Bell, 1984). It is the responsibility of each vocational educator to work at developing a learning environment which will contribute to the overall well-being and success of every student. The key factors found in a wholesome learning environment are those which promote:

1. **Safety, organization, and physical comfort.** In the vocational laboratory, it is absolutely crucial that each student abide by safety rules set by the instructor. In addition, the laboratory should be kept well organized and clean. A laboratory which is safe, well organized, and physically comfortable helps promote high morale and good work habits.

2. **Respect and acceptance**. Within an effective learning environment, students will show respect not only for the instructor but for each other as well. The instructor should be the student's best role model. The care and acceptance given by the instructor to each student (disabled or non-disabled) will go a long way in promoting peer acceptance, a positive attitude, and healthy self-esteem.

3. **Discipline.** A wholesome learning environment is one which promotes discipline and a positive self-concept within each student. Inappropriate behavior has the potential to seriously affect classroom safety, morale, and the overall learning process. Ways in which the instructor can help the student modify inappropriate behavior include: (a) utilizing the time-out technique, (b) developing student-teacher contracts, (c) ignoring negative behavior--whenever possible, and (d) rewarding appropriate behavior with approval and praise.

4. **Flexibility**. An effective learning environment is flexible and can adapt to a special student's unique needs (i.e., slower rate of learning, inability to access regular tools/equipment, or remedial needs in reading or math for instance). A flexible environment fosters individualized programs through which a special learner can develop marketable skills for employment.

Modifying Facilities, Equipment, and Tools

In the past, many special needs learners have been denied their basic right to a public education because of architectural barriers, nonadaptive facilities, equipment, and tools (Phelps & Lutz, 1977). However, federal legislation has done a great deal to provide equal access to educational programs for every learner. For example, according to Section 503 of the Rehabilitation Act of 1973, each federally funded program or activity in which a handicapped individual can enroll and profit must be made accessible to the student (Sarkees & Scott, 1985). In addition, the Carl Perkins Act of 1984 has emphasized the importance of providing supplemental services for special needs learners, which include the adaptation of facilities, equipment, curriculum, and instruction (Cobb & Kingburgy, 1985).

Modifying facilities. A barrier-free facility planned for safety, efficiency, and convenience is of vital importance to individuals with special needs--especially those who are in wheelchairs, on crutches, or have artificial limbs. According to Sarkees & Scott (1985), three major areas in which architectural barriers may be present at most vocational education facilities are:

1. **Getting to and entering the building** -- getting to the ground from public or private transportation; parking; negotiating parking lot pavement, curbs, walkways, ramps, and stairways; and entering exterior doors.

2. **Moving about inside a building** -- moving through corridors and hallways; moving from floor to floor; identifying and entering classrooms, laboratories, and auxiliary areas; moving through aisles and traffic lanes inside classrooms and laboratories.

3. **Using school fixtures, appliances, and study/work station area equipment** -- using restrooms, drinking fountains, vending machines, tools, machines, and work station apparatus.

In an effort to eliminate these barriers, vocational educators, planners, and administrators should contact the State Architectural Barriers Board or State Department of Education regarding the guidelines and standards that have been developed for compliance with federal mandates. The federal government has adopted the American National Standards Institute (ANSI) accessibility standards as its mandatory guidelines for removal of architectural barriers (Sarkees & Scott, 1985).

Modifying equipment and tools. Based upon the needs of each special learner, it may become necessary to modify existing equipment and tools to accommodate the special needs student. The degree of modification will depend upon the type and extent of each student's impairment. It should be remembered, however, that equipment should be modified only to the extent necessary to assist the student. Whenever possible, as the student generates competence in a learning task, the modified equipment should be replaced with regular equipment (Phelps & Lutz, 1977). The following are some general suggestions in which equipment and tools can be modified for specific classifications of special needs students (Phelps & Lutz, 1977; Sarkees & Scott, 1985; Stern & Gathercoal, 1986):

Important Note: It is very possible that a number of these suggestions could apply to more than one category.

Furthermore, some of these modifications may be applicable to disadvantaged and LEP students. This, of course, would depend upon the needs of the particular student.

Modifications for Orthopedically-Impaired Students

1. Work benches can be cut out so that wheelchair bound students can pull up close to the work surface.

2. Modify the height of workbenches, storage cabinets, table tops, etc. to make them accessible to wheelchair bound students.

3. A lap board can be fitted on the arms of the wheel chair to provide a work area.

4. Rearrange storage areas for tools and supplies to make them accessible and as near to the work station as possible.

5. Position bench-mounted power tools on the ends of benches.

6. Semistationary equipment should be put on variable height bases.

7. Modify machine controls so that they can be operated with prostheses such as an arm hook.

8. Replace cabinet knobs with levers or handles.

9. Convert knob-type ON-OFF switches to toggle switches, levers, or slide-adjustment mechanisms.

10. Provide an aid that increases mechanical advantage in manipulating controls.

11. Convert machines and equipment that have hand controls to the foot pedal type for students who have upper extremity disabilities.

12. Select machines that do not require two-handed operation, such as a radial arm saw instead of a table saw.

13. Place small parts of instruments on a foam pad to aid students in picking them up.

14. Select tools that require only one hand to operate, such as split screwdrivers, which hold screws and bolts for starting.

15. Provide holding devices such as vacuum vises, stationary vises, clamps, jibs, and fixtures that permit one-handed operation.

16. Provide tools that supply more mechanical advantage to loosen or tighten screws or bolts, such as a lever-type socket set or an offset screwdriver.

17. For students who have weak hands, increase the size of tool handles by replacing them with larger diameter handles or by enlarging them with tubing or tape wrappings.

18. Provide templates to aid drafting students who have trouble manipulating standard drafting instruments.

Modifications for Hearing-Impaired Students

1. Install a red light next to the on-off switch so that the student can tell when the machine is in operation.

2. Install amplification devices on auditory warning signals so that they can be heard by those with partial hearing.

3. Use visual timers in place of those that emit sounds.

Modifications for Visually-Impaired Students

1. Purchase commercially available measuring tools with raised or engraved markings that can be read by touch.
2. Purchase measuring devices that provide auditory signals.
3. Brailled tape or raised marks can be used on control dials and switches.
4. Enlarge markings on tools, tool holders, or machine controls.
5. Provide jigs, guides, and templates to aid students in positioning and guiding tools.
6. Identify controls by changing their size, shape, or texture.

Modifications for Mentally-Impaired Students.

1. Color code important parts of machines or equipment.
2. Devise jigs, fixtures, templates, and guides to simplify work task operations.

Modifications for Limited English Proficient Students

1. Utilize name placards (Spanish and English) for machines, tools, and equipment.
2. Color code or use symbols for dangerous machines. For example, one red dot could indicate a dangerous machine and two red dots could indicate a very dangerous machine.

A wide variety of specially designed aids, tools, machines, and equipment are commercially available to assist the special needs learner. Occasionally, this material can be paid for through vocational rehabilitation centers or the school's special education program. Information pertaining to manufactured devices can be found in school supply catalogs or in catalogs published by special institutes. A very comprehensive resource has been developed by the Wisconsin Studies Center, University of Wisconsin-Madison, entitled Tools, Equipment and Machinery Adapted for the Vocational Education and Employment of Handicapped People. In addition, information is available through the school's special education personnel and vocational rehabilitation counselors (Sarkees & Scott, 1985).

In conclusion, two educational topics have been presented which are **fundamental components** to the successful instruction of learners with special needs: (a) developing or tailoring an appropriate curriculum and (b) establishing a favorable learning environment. Within the final section of this Overview, basic principles will be presented which will address the actual instruction of special learners.

MODIFICATION OF INSTRUCTION

The primary purpose of this section is to provide the vocational educator with teaching strategies and techniques that will be useful when instructing students with special needs. It is important to remember that the methods and approaches used by educators when instructing non-special needs students may not be very effective with students with special needs (Gleiss-Monar & Sitlington, 1983). Therefore, individualizing instruction becomes vitally important in the successful instruction of special learners.

Within this section, the following topics will be discussed: (a) learning styles, (b) teaching strategies, (c) remediation techniques, and (d) Brown's 3-Cs Instructional Mode.

Learning Styles

Each special learner has unique needs and these needs affect how the student can best learn. For example, if a student is blind or has difficulty with "visual" learning, the instructor should stress the learner's sense of sight. Therefore, the manner in which a student with special needs learns ceases to be a preference, but becomes instead a necessity (Kok, Jernigan, & Hull, 1978). Further, one of the main philosophies behind individual learning styles is that learning should be a pleasant and successful experience. Educators, therefore, should adjust their style of teaching to allow students the benefit of learning in their preferred manner (Kok, Jernigan, & Hull, 1978).

Identifying a student's learning style.

The following are methods in which an educator can identify a student's learning style:

1. **Informal observation.** One of the simplest and possibly best ways to identify a student's learning style is through informal observation. By observing the student as he or she negotiates classroom/laboratory learning activities, the educator can collect valuable information with regard to the student's learning style. For example, the educator may observe that a disadvantaged student answers questions in class and does well with hands-on activities but repeatedly fails written exams. If the primary intent of the instruction is to reach vocational skills rather than reading and writing skills, the instructor could modify their style of teaching by allowing the student to take oral and/or hands-on exams (Kok, Jernigan, & Hull, 1978: Sarkees & Scott, 1985).

2. **Teacher consultation.** Consulting other teachers (i.e., special education teachers, resource room teachers, support personnel, paraprofessionals, and other vocational education teachers) can be an excellent source for information regarding a student's learning style (Sarkees & Scott, 1985).

3. **Student/parent interviews.** Interviewing the student and student's parents/guardians can result in valuable insights as to the student's best learning modes (Sarkees & Scott, 1985).

4. **Standardized inventories.** Standardized inventories provide an alternative for students who are shy or uncomfortable during a personal interview. Information received from interest, personality, and learning style inventories can provide valuable information with regard to the student's learning style (Kok, Jernigan, & Hull, 1978; Sarkees & Scott, 1985).

Teaching Strategies

Once the student's vocational goals, learning capability, and preferred learning style have been identified, the educator can begin to experiment with a variety of teaching techniques and instructional materials. When determining the teaching technique and instructional material best suited to meet a student's unique needs, it is important for the educator to be patient, open-minded, and flexible. Not every instructional technique and/or material can be used successfully with each learner (Sarkees & Scott, 1985). In addition, the educator should not hesitate to enlist the support of other instructors, school counselors, student aides, paraprofessionals, volunteers from the community, itinerant teachers, and/or interpreters. This pooling of efforts can result in increased student learning because of the variety of approaches and personal attention which can be brought to the classroom or laboratory (Harrington & Fardig, 1982).

The following are general guidelines and instructional techniques which an educator can use to help meet a special needs learner's unique needs and learning style:

1. **Orientation**. Students with special needs may need additional orientation with regard to: (a) the relevancy of their individualized goals, (b) class procedures, (c) safety, etc.

2. **Flexible pacing**. Students with special needs can exhibit different rates of learning. The educator should provide flexibility in pacing of instruction and assignments to meet the various needs of learners. In general, students with special needs should be individually paced to maintain their progress and interest, yet avoid the frustrations and failure undue pressure may cause (Harrington & Fardig, 1982; Sarkees & Scott, 1985).

3. **Demonstration.** Utilization of the demonstration method can be very effective in introducing a new skill to a learner with special needs.

4. **Breaking material into small distinct steps**. As a general rule, it is important for the educator to break a learning concept into small distinct steps. In this way, the educator can best identify where the student is experiencing difficulty.

5. **Positive environment and feedback**. In general, students with special needs lack confidence and a positive self-concept. This is primarily due to their not having had much success in life. In addition, the few successes special learners do have usually result in little, if any, positive reinforcement (i.e., praise, reward, and/or encouragement). Therefore, it is incumbent upon educators to create a positive, nonthreatening learning-environment for their students and to make generous use of positive feedback when the student experiences success. Constructive criticism should not be avoided; however, it should be given in a positive manner (i.e, students should understand that their behavior or product is what's being criticized and not their worth as a human being). Finally, all students must learn that mistakes and constructive criticism are a normal and expected part of life (Harrington & Fardig, 1982).

6. **Use of peer tutors, college students, and volunteers**. Use of peer tutors, college students, and volunteers can greatly assist a vocational educator's work with special learners by: (a) helping with individualized instruction, (b) providing positive role models, (c) increasing student participation, (d) increasing the special learner's success experiences, (e) increasing the student's confidence

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and self-esteem, and (f) improving the special learner's social and academic skills (Asselin & Anderson, 1986). In addition, peer tutors, college students, and volunteers can receive teaching experience and the satisfaction of helping individuals with special needs progress.

7. **Flexible grouping**. The educator can integrate special needs learners into groups of various sizes (according to the student's goals, interests, or ability level) and utilize peer tutors, college students, and volunteers for assistance. According to Sarkees & Scott, grouping students has the following advantages: (a) it allows the teacher more time to work among the students, (b) it allows the teacher to individualize instruction, tasks, and assignments to meet the needs of students in a specific group, (c) it provides special needs learners with an opportunity to work with peers and establish positive interpersonal and working relationships with them, (d) it serves as a motivating factor for special needs learners because the individualized nature of the group work does not become threatening or frustrating but allows students an opportunity to work at their own pace through their strongest learning style, (e) it allows teachers to arrange for instruction for the entire class, small group discussions, project groups, and small remedial sessions so that instruction will be diversified and more meaningful for all students; and (f) it allows the teacher to modify the task or assignment for a small group of students with specific needs, as in the case of learners who have a physical disability (Sarkees & Scott, 1985).

8. **Providing field trips and job site visits**. Scheduled field trips and job site visits can give all learners a realistic first-hand look into the real world of work. By "shadowing" workers in a particular occupational area, students can gain helpful insights into their own career decision. In addition, a field trip or job site visit can be very motivational in that the student can readily observe how his/her vocational training will be used in the world of work (Sarkees & Scott, 1985).

9. **Use of media**. Utilizing media can embellish instruction by: (a) assisting the teacher in presenting the proficiency or skill requirements for a specific job, (b) reinforcing concepts presented in a classroom, laboratory, or demonstration activity, (c) providing a vehicle for special needs learners to show what they have learned, (d) providing a valuable source of remedial assistance, (e) providing simulated learning experiences, (f) allowing special needs students to learn through their strongest style, and (g) adding variety to the instructional program. Examples of media include: computer assisted instruction (CAI), 16 mm films, film strips, flip charts, overhead transparencies, tape recorders, records, posters, magazines, and diagrams (Sarkees & Scott, 1985).

10. **Use of student-teacher contracts**. Student-teacher contracts can be excellent tools in helping learners with special needs achieve their vocational goals. The following guidelines should be used in developing and implementing a student-teacher contract: (a) decide on the task or project, (b) specifically state the requirements, (c) determine the minimum acceptable accuracy, (d) set a time limit--initially, short assignments and short time periods are usually best, (e) identify consequences, (f) discuss contract with student and support personnel, (g) have all parties sign the contract, (h) positive reinforcement should be given if the terms of the contract are satisfactorily met, (i) uncompleted contracts should be analyzed by the teacher and student to determine the causes, and (j) develop new contracts cooperatively (Sarkees & Scott, 1985).

The following is a list of specific teaching strategies which educators can utilize when addressing the unique needs of handicapped students (Sarkees & Scott, 1985; Stern & Gathercoal, 1986; Tindall; 1980):

Important Note: It is very important to note that many of these teaching strategies could be used for all students. Appearing later in this Overview is a listing of instruction strategies which could be generic to all special needs students.

Instructing Students Who Are Mentally-Impaired

Involve as many different senses as possible in the learning process.

Use concrete specific terms rather than abstract terms. If necessary, have the student repeat the necessary information to you.

When giving written directions use lists instead of paragraphs. With regard to the student who can barely read, contact the remedial reading staff and arrange reading instruction. This instruction should focus on required reading for your course and that which is vital for employment.

Teach by demonstration (whenever possible). Don't hesitate to use hand-over-hand assistance in demonstrating how to use a tool or machine.

Allow time to practice machine or tool processes.

Break down complex operations into smaller tasks.

With regard to feedback, let the learner know what is wanted, and whether or not the student is achieving it. Give lots of positive reinforcement and encouragement. Nonverbal feedback is also helpful (i.e. touching the student or task, pointing, blocking or stopping an error as it is developing, and guiding the learner's movements). In addition, provide specific feedback with regard to the student's work. For example, the educator should say, "This piece was cut exactly to the right size," or "You put these two parts together correctly, " or use Mark Gold's expression "Try another way" (Gold, 1975).

Build the student's confidence by: (a) utilizing activities that will assure success, (b) assigning special tasks which will communicate with the educator's confidence in the student, (c) giving students an opportunity to correct their work and hand in a good project or assignment, and (d) displaying the student's good work.

In helping students with their ability to make correct discriminations, utilize Gold's "match to sample" technique in which the student is provided an example and a number of choices. The student will choose the correct alternative based upon the characteristics of the sample (Gold & Scott, 1971).

With regard to helping the student make correct discriminations when there are minimal differences between the stimuli, it may be necessary to: (a) present the choices in an easy form at first, (b) exaggerate attributes, (c) make the choices gradually harder, or (d) add and fade out color cue, add and then gradually remove large cue differences, or combine these two approaches.

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Retention/memory can be improved by: (a) being systematic and presenting one new piece of learning at a time, (b) relating new material to familiar material, and keeping it practical and concrete, and (c) utilizing training techniques such as the total task method, chaining, modeling/demonstrating, and the structured overview (see Tindalls' Puzzled About Educating Special Needs Students).

"Generalizing", or having the student apply what has been learned to the contexts, can be improved by: (a) using examples from different relevant contexts and (b) practicing in settings similar to or exactly like those that will be encountered on the job.

Instructing Students Who Are Hearing-Impaired

In private, discuss with the student his/her ability to communicate with you (lip/speech reading, use of hearing aid, writing, signing, and total communication). An open discussion with the student which demonstrates your concern as an educator is an excellent beginning in building rapport.

Body language communicates messages too. Remember not to give mixed messages with your body language. Also, be alert to the body message the student is giving you (i.e., is he/she communicating tension, nervousness, avoidance, or confusion?)

If you will be working with an interpreter, do not instruct the deaf student as if he/she were a third party. Speak directly to the student. Also, remember that the interpreter is ethically bound to interpret everything you say. Therefore, sensitive or other issues concerning the student is best addressed in a meeting before or after class. If you are using media where the room must be darkened, focus a small lamp on the interpreter.

Maintain good eye contact with the student while speaking.

Speak slowly and clearly, pronouncing each word, but without exaggerating or over pronouncing.

Do not stand in front of a window while speaking. The light should be shining on your face and not the student's.

Try to rephrase a thought rather than saying the same words over again.

Encourage the student to read ahead on class material.

Try to keep the noise level down as much as possible in the class/laboratory.

Utilize handouts, the chalkboard, and other media.

Install a light to indicate when dangerous machinery is on.

Instructing Students Who Are Speech-Impaired

Always maintain eye contact and nod your head while the student is talking. This will help the student build confidence.

Work cooperatively with speech therapist and/or communication specialist to determine which technique will help most in assisting these students to communicate more effectively.

Encourage peer tutoring and small group activities to help the speech-impaired student develop interpersonal relationships with the other students.

Always allow sufficient time for the student to complete his/her sentence.

Try not to act uncomfortable when these individuals are communicating with you (i.e., discontinuing eye contact, shifting your position, clearing your throat). Your discomfort can be very discouraging to the student.

Do not require these individuals to present oral reports until they feel comfortable in the classroom environment.

Model correct sentence structure for the speech-impaired student so he/she can follow your example.

Develop a list of technical terms used in your class and share these terms with the speech specialist to help the student become more confident n pronouncing terms used in class.

Instructing Students Who are Visually-Impaired

Orient the student to the classroom or laboratory before the course begins. Consistency and orderliness in the physical environment is very important to the visually-impaired student.

Arrange seating so the blind student will be able to hear the instruction and to allow for the best distance and lighting conditions for the partially sighted student.

Provide as many opportunities as possible for the visually impaired student to observe closely or to touch the materials.

Give materials and handouts to the student ahead of time. Also, a student peer can assist the visually-impaired student by making a carbon copy or a photocopy of their notes. Also, when possible, the educator can make a copy of their teaching notes. In this way, the visually-impaired student can review the materials with a tutor or have them transcribed into braille or taped.

It is important to gain and maintain the student's attention. Approval or disapproval will need to be verbalized.

Remember there is no need to talk louder to a visually-impaired student.

Rehabilitation counselors or special needs teachers can be useful resources in helping the student use commercial or modified learning aids or tools.

Tests may need to be prepared in large print, braille, on cassette tapes, or converted into exercises using the sense of touch. Also, it may be necessary to allow the student extra time to complete the test.

The tape recorder is the most frequently used technique for notetaking and preparing modified learning materials for the visually-impaired student.

The following is a sample of specially designed machines now available for the visually-impaired student: (a) OPTACON (Optical to Tacile Converter) allows students to read printed material, (b) STEREOTONER is similar to the OPTACON but converts the printed word into a tone pattern, (c) OPTOPHONE and VISOTACTOR convert print into sound, and (d) KURZWEL READING MACHINE which converts standard English text on a computer into easily comprehended speech.

A number of general tools or aids which can assist the student in reading or writing lessons for vocational courses follow: (a) braille, (b) large print, (c) tape recorders, (d) talking books, (e) raised letters, (f) slate and stylus (used to make notes), (g) braille writer (a 6-key manually operated machine), (h) typewriters, (i) braille verifier (types braille and regular copy simultaneously), and (j) signature guides.

Aids for mathematics and computer programming courses follow: (a) abacus design for the blind, (b) raised clock faces, (c) wire geometrical forms, (d) braille rulers, (e) raised-line checkbooks, (f) raised-line boards, (g) braille dominoes, (h) braille flash cards, (i) cubes with raised braille dots used for simple mathematical problems, (j) raised-line paper or graphs, (k) computer terminals that use braille printers, or those that type braille and conventional type simultaneously, and (l) talking calculators.

Aids used frequently in other vocational courses include: (a) braille maps, charts, diagrams, (b) self-threading needles, (c) wooden or cardboard models of specimens that other students see through microscopes, (d) braille micrometers and other shop tools that have special raised markings, (e) braille demo tapes to mark lab equipment and models, (f) light probes with audible sounds that check the operating status of machines, and (g) guides or templates to help students align objects properly.

Instructing Students Who Are Seriously Emotionally Disturbed

Consult with the student's parents, special education teacher, or counselor to determine whether any particular teaching techniques will help or hinder learning.

Try to understand the student. Disturbing behaviors are the outward sign of inner turmoil.

Go easy on bad days and avoid direct confrontations that would aggravate the situation.

Communicate acceptance to the student and a willingness to help him or her succeed in class.

Provide immediate feedback and reinforcement.

Establishing a rapport and trust with the student is important.

In the beginning of the semester, help the student gain confidence by giving him or her lessons in which success can be achieved in a series of small steps.

A measure of privacy when the student attempts a new task can ease his or her embarrassment at any awkwardness or ineptness.

Allow the student to correct mistakes prior to turning in an assignment or project to ease any pressure.

Help the student not to overreact to failure and praise him or her for continuing to try.

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Cue appropriate behavior in a quiet, unemotional manner.

In resolving discipline problems: (a) do so in privacy, (b) focus on objective facts in a calm, supportive tone, (c) actively listen to the student, (d) after listening to the student, reflect on what has been said, by telling the student what you've heard, (e) ask the student if he or she has any ideas about solving the problem (encourage the student to be specific), and (f) conclude with a clear understanding of the changes, timeframe, and benefits which are expected.

In handling aggressive behavior: (a) try to remain calm and model the controlled behavior which you desire, (b) intervene by either separating the individuals involved and having them work on another activity or having them take a time-out in separate corners of the room, (c) if necessary, send an uninvolved student to the office to get help, either in talking to the students or in managing the class while the teacher talks to them, and (d) return to normal classroom procedure as quickly as possible.

Access professional collegues in special education evaluation, counselling, or therapy when the student's behavior appears to be in need of additional attention.

Instructing Students Who Are Orthopedically-Impaired

In general, students with physical handicaps will be intellectually capable and able to participate in vocational programs.

Make the necessary modifications in classrooms, laboratories, equipment, building accessibility, and lavatories.

For notetaking the student can: (a) use a tape recorder, (b) have a classmate slip a carbon copy into his/her notebook to duplicate notes, and/or (c) have the instructor prepare an outline of the lecture.

For exams the instructor can: (a) give oral exams, (b) have the student dictate answers into a tape recorder or to another student, or (c) utilize a typewriter/computer if the student is able to type/keyboard.

Give the student more time to complete homework assignments. Also, giving the student advance notification of assignments is helpful.

In the laboratory, pair the student with one or more capable students in the class.

Enlarge copies of frequently used charts and diagrams posted near the student's desk eliminates the necessity of paging through a book.

Instructing Students Who Are Other Health-Impaired

Allow the students sufficient time for rest.

Seat the student in the most convenient place for easy access to necessary facilities (hall, lavatory, chalkboard, laboratory work stations).

Allow the students to work on program requirements at his or her own pace.

Tape lectures so the student can listen to them at home.

Work cooperatively with the health team in order to learn more about the student's special needs.

Utilize community resources personnel (social workers and itinerant teachers for home-bound students) for delivery of materials, assignments, and handouts.

Instructing Students Who Have Specific Learning Disabilities

Use visuals and demonstrations as often as possible.

Use concrete examples whenever possible.

Provide student with an outline of what will be covered in class.

Make sure all printed materials are clear and readable.

If the student has a visual perception problem, allow him or her to tape-record assignments.

Allow students to take tests orally or in a mode that compliments their performance.

Present new information in small amounts.

Make sure that writing assignments are relevant to the content of the program.

Allow students a longer period of time to complete assignments, if necessary.

List assignments in steps.

Task analysis can be used to lower the frustration level of these learners.

Programmed instruction materials can be very effective with these learners.

The following is a list of specific teaching strategies which can be very useful when working with students who have **limited English proficiency** (Sarkees & Scott, 1985):

Recognize the student's cultural background and allow for the student's individual differences.

Encourage these students to bring dictionaries to class.

Use demonstrations and hands-on experience as much as possible.

Speak slowly and use simple vocabulary and grammar.

Use bright felt tip markers to mark important words, passages, or illustrations.

If possible, use a translator for important concepts.

Work closely with LEP support personnel.

Keep homework assignments short.

Check for comprehension by asking the student what you have said.

Use simple sentences when writing test items so the student can concentrate on answering the question rather than deciphering it.

And finally, with regard to the disadvantaged population, typically these individuals dislike school, lack motivation, and have a low self-concept or esteem. Therefore, an educator's personal commitment and high expectations for the student may be two of the biggest single factors which will make a positive difference in this individual's life. Additionally, an educator's good example (i.e., being patient, understanding, well organized, and a good manager) can be extremely valuable in motivating and positively shaping the student's behavior (Baca, 1981). Vocational education can offer a great deal to the disadvantaged student in terms of teaching academic and social skills relative to the student's potential employment (Baca, 1981). The following are additional techniques or teaching strategies which can be very useful when working with disadvantaged students (Baca, 1981):

The educator should seek to understand the student's educational and social background through: (a) assessment information, (b) interaction with former teachers, (c) discussions with counselors, and (d) visits with parents to ascertain the student's social limitations and home situation.

Basic math, communication, and social skills should be reinforced. Math skills can be reinforced through hands-on learning activities. Communication skills can be improved by tactfully correcting poor grammar, when appropriate, and by providing resources that encourage reading in job related interests. Social skills such as getting along with people, grooming, proper dress, and respect for property and authority should be reinforced on a continual basis.

The importance of finishing school should be continually stressed. Relate acquisition of job skills to earn income.

Reinforce the student's feelings of self-worth by having high expectations for the student and by providing immediate reinforcement for work done well.

Simulate realistic job situations. All classroom and laboratory experiences should relate to employment in the occupation being studied.

Disadvantaged students (as all students) will typically react to the learning environment in a responsible and mature manner when they are treated with respect and as adults by the educator.

Classroom organization and discipline (being firm but not overbearing) are especially important. Generally, disadvantaged students want and need structure and discipline within their lives. Usually, these individuals will be responsive to and respect teachers who are firm, but sensitive.

Help the student develop employability and job coping skills (i.e., skills associated with finding, applying for, and retaining a job).

Help the student establish good work habits by keeping him or her involved with meaningful learning experiences. Each activity should have concrete learning objectives.

Disadvantaged students may need more encouragement to stay on task; however, they still should be required to complete all assignments (just as they will be required to do on the job).

Present instructions and information in clear, logical steps--building from the simple to the complex.

Technical terms should be communicated clearly and concisely and written in language which the students will understand.

Incorporate a variety of instructional methods in the curriculum (i.e., demonstrations, resource personnel, field trips, peer tutors, role playing, audio-visual aids, and on-site work experiences).

Present supplemental materials when appropriate. If such material is relevant to the acquisition of job skills, the student will not be humiliated by simplified material.

Highlight important parts of the student's text with a light marker to prevent the student from feeling overwhelmed with a larger volume of reading material.

Progress charts can be utilized to motivate disadvantaged students to master new skills.

Utilize flash cards (teacher made or commercial) to reinforce new terms and the use of tools and equipment.

When teaching special needs students, it is very important that instructors do not limit their instructional techniques. Therefore, the following abstract of instructional techniques or strategies has been prepared which could be considered generic to all special needs populations.

- Involve as many different senses as possible
- Use concrete terms
- Have students repeat important information
- Use lists rather than paragraphs for written directions
- Teach by demonstration
- Use hand-over-hand assistance when necessary
- Allow practice time
- Break complex operations into smaller tasks
- Provide immediate feedback
- Build confidence

- Help student make correct discriminations
- Help student with their retention/memory
- Help student generalize knowledge
- Build rapport
- Use appropriate body language
- Use appropriate techniques when working with an interpreter

- Maintain good eye contact
- Speak slowly and clearly
- Rephrase thoughts when necessary
- Encourage the student to read ahead
- Keep the noise level down
- Utilize various forms of media
- Use lights to indicate when dangerous machinery is on
- Work cooperatively with therapists
- Encourage peer tutoring
- Try not to act uncomfortable around special needs students
- Help students feel comfortable
- Model correct sentence structure
- Develop a list of technical terms for students and/or therapists

- Orient students before the course begins
- Provide handouts ahead of time
- Maintain student's attention
- Use tape recorders for note taking
- Try to understand the student
- Communicate acceptance
- Develop success experiences for the student

- Use appropriate behavioral management techniques
- Facilitate the students with their notetaking
- Facilitate the students with exams

- Pair students
- Enlarge charts and diagrams
- Use clear readable visuals frequently
- Provide an outline of material which is being taught

- Writing assignments should be relevant
- Use task analysis when necessary
- Allow for individual differences
- Encourage students to bring a dictionary
- Use felt tip marker to highlight important parts
- Do not make homework assignments too lengthy

- Use simple sentences when writing test items

- Reinforce basic education and work skills
- Reinforce the importance of finishing school
- Reinforce the student's feelings of self-worth

- Simulate realistic job situations
- Treat all students with respect and dignity
- Provide structure and organization
- Utilize progress charts
- Utilize flash cards

Remediation in the Basic Education Skills

It is very important to note that some students may need to acquire one or more basic education skills (i.e., mathematics, reading, writing, speaking, listening, interpersonal relations, and/or reasoning skills) to succeed in a vocational program. In addition, many employers will not hire an individual if he or she lacks these skills. Therefore, instruction in basic education skills may be necessary by the vocational educator. For information concerning basic or generalized skills instruction see Module 8.

Brown's 3-C Model

Brown's 3-C Model helps tie together many of the educational aspects discussed in this Overview. In general, Brown suggests that when delivering instruction to learners with special needs, the instructor can enhance the student's success rate and reduce feelings of frustration by considering the following 3-Cs of instruction: (a) correction, (b) compensation, and (c) circumvention (Brown & Dayser, 1982):

Correction. Providing feedback when the student's skills are being developed, thereby, correcting inappropriate behaviors immediately after they appear. Employing remedial reading and math services to enhance the student's ability to function within the program.

Compensation. Helping the student realize that each task represents only one of many activities contained in the course and that weaknesses in one area can often be offset by strengths in other areas. It should be communicated to the student that some tasks are inherently difficult and that he/she should not expect to achieve success immediately. Further efforts to compensate for the student would be to modify or adjust the delivery of instruction to extend over segments of several class periods. In addition, reinforcement during the early stages of instruction should be amply provided.

Note: Basically, "compensation" involves the instructor's modifications to the curriculum, learning environment, and instruction which has been discussed in this Overview.

Circumvention. If the vocational program is way out of reach for a student, for example, due to a course requirement of a relatively high level of reading skill, it may become necessary for the student to "circumvent" this difficulty by discussing alternate training programs with a vocational counselor.

Summary

Modification of curriculum, learning environment, and instruction can be an important key to successful employment training for special needs students. It requires that the instructor know his/her content completely, but the benefits to all students will likely be extraordinary.

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COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

(1) acceptance policies on student transfers from other school districts;

(2) operation of school bus routes or runs on a non-segregated basis;

(3) nondiscrimination in extracurricular activities and the use of school facilities;

(4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;

(5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;

(6) nondiscriminatory practices relating to the use of a student's first language; and

(7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964; EXECUTIVE ORDERS 11246 AND 11375; TITLE IX, 1973 EDUCATION AMENDMENTS; REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; AND VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulations by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs or activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.